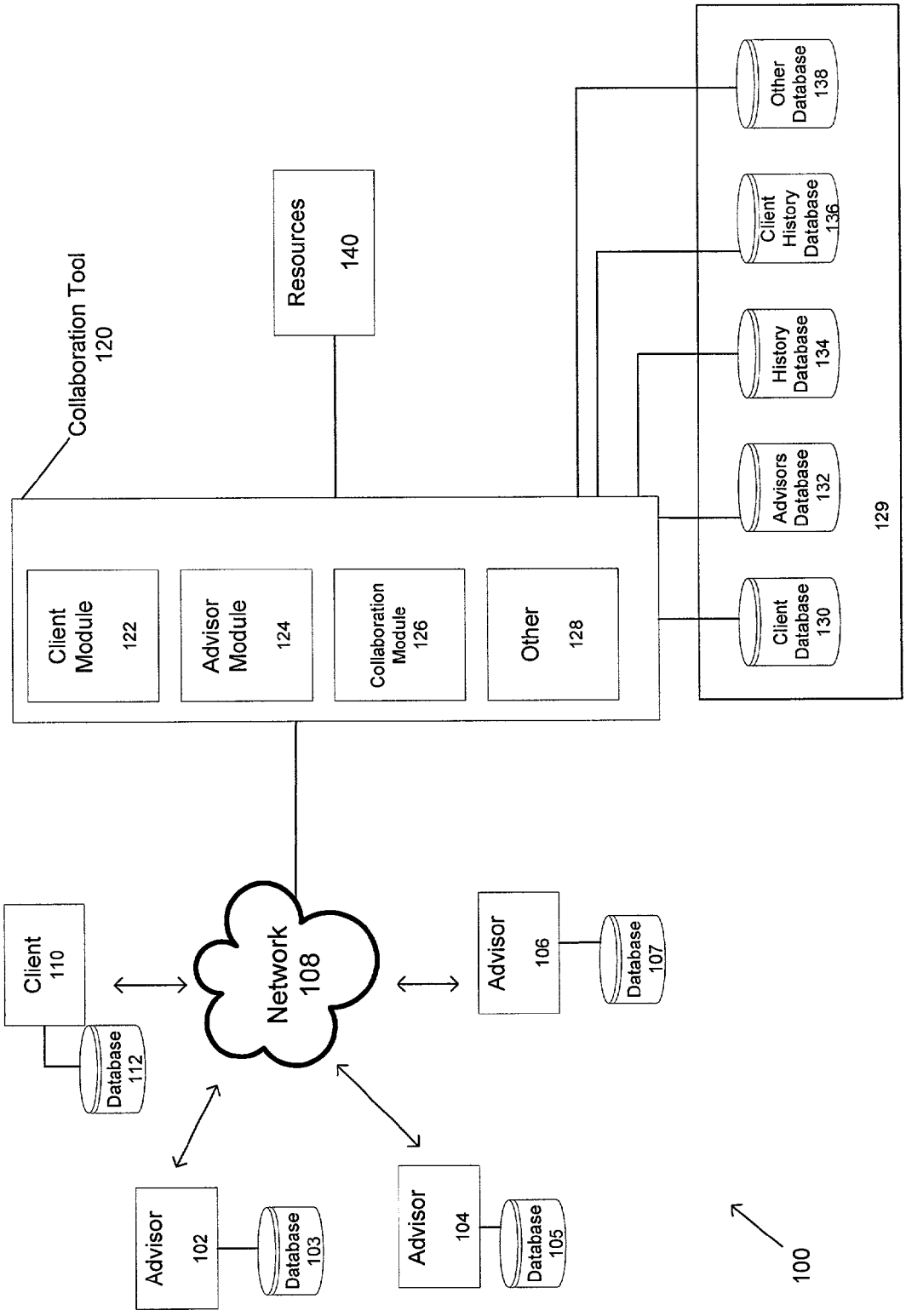
Collaboration Tool
120
Resources
140
Client Module
122
Advisor Module
124
Collaboration Module
126
Other
128
Client Database
130
Advisors Database
132
History Database
134
Client History Database
136
Other Database
138
129
Network
108
Client
110
Database
112
Advisor
102
Database
103
Advisor
104
Database
105
Advisor
106
Database
107
100

FIG. 1

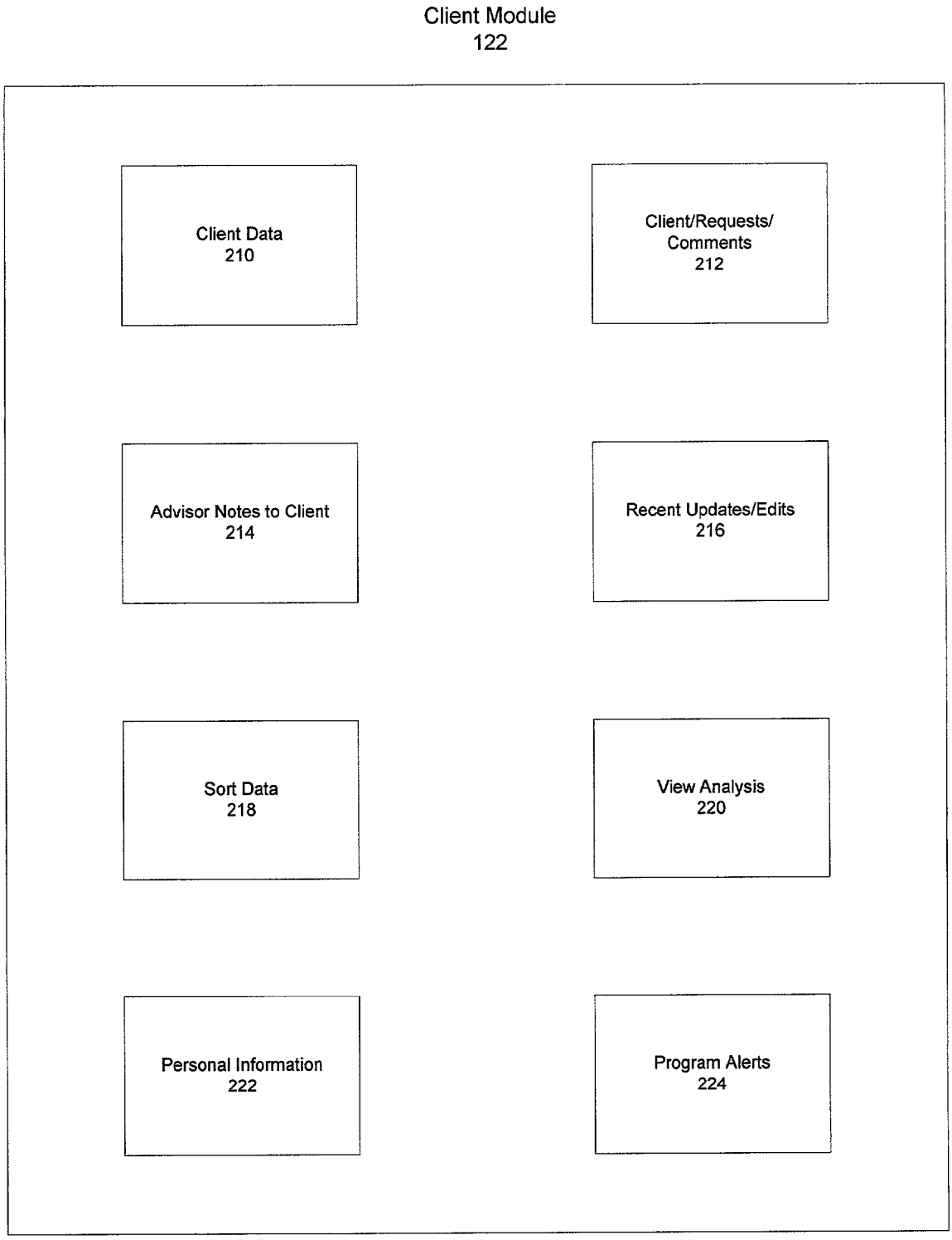
Client Module
122
Client Data
210
Client/Requests/
Comments
212
Advisor Notes to Client
214
Recent Updates/Edits
216
Sort Data
218
View Analysis
220
Personal Information
222
Program Alerts
224

FIG. 2

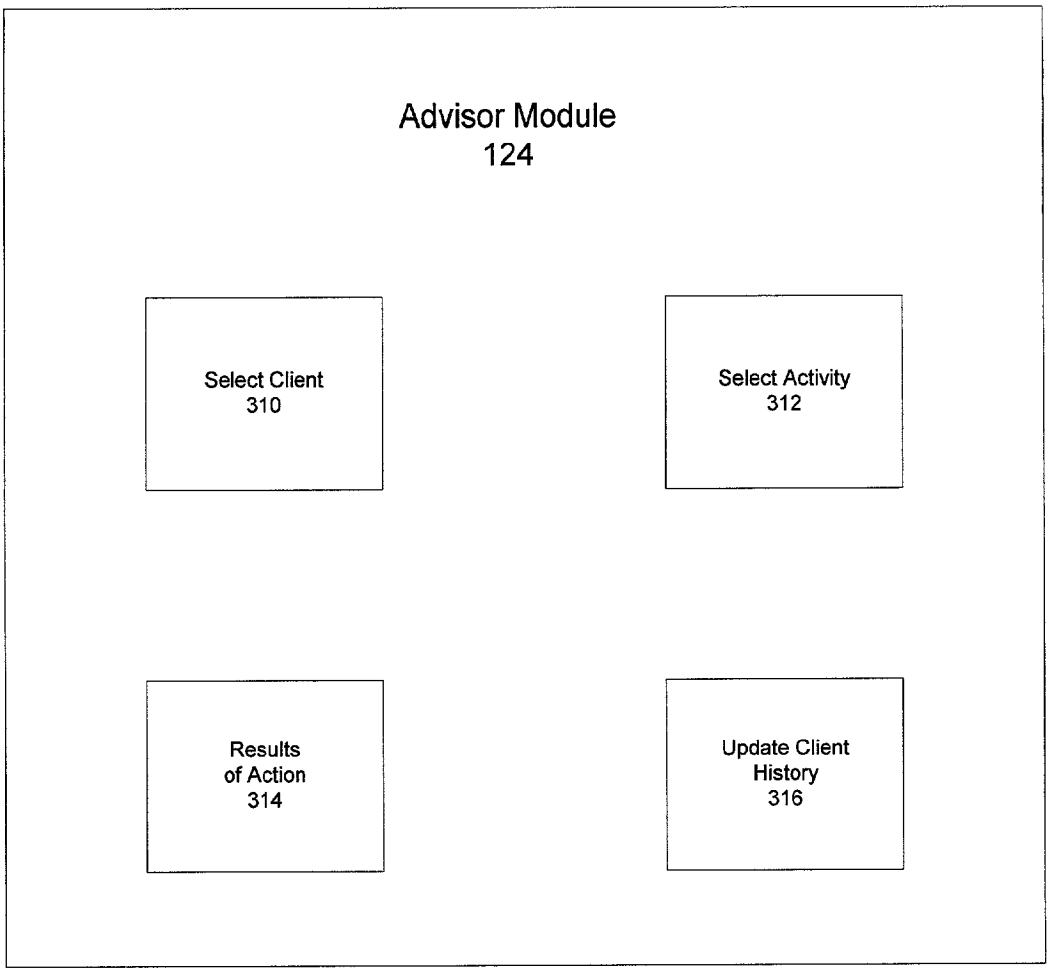
Advisor Module
124
Select Client
310
Select Activity
312
Results
of Action
314
Update Client
History
316

FIG. 3

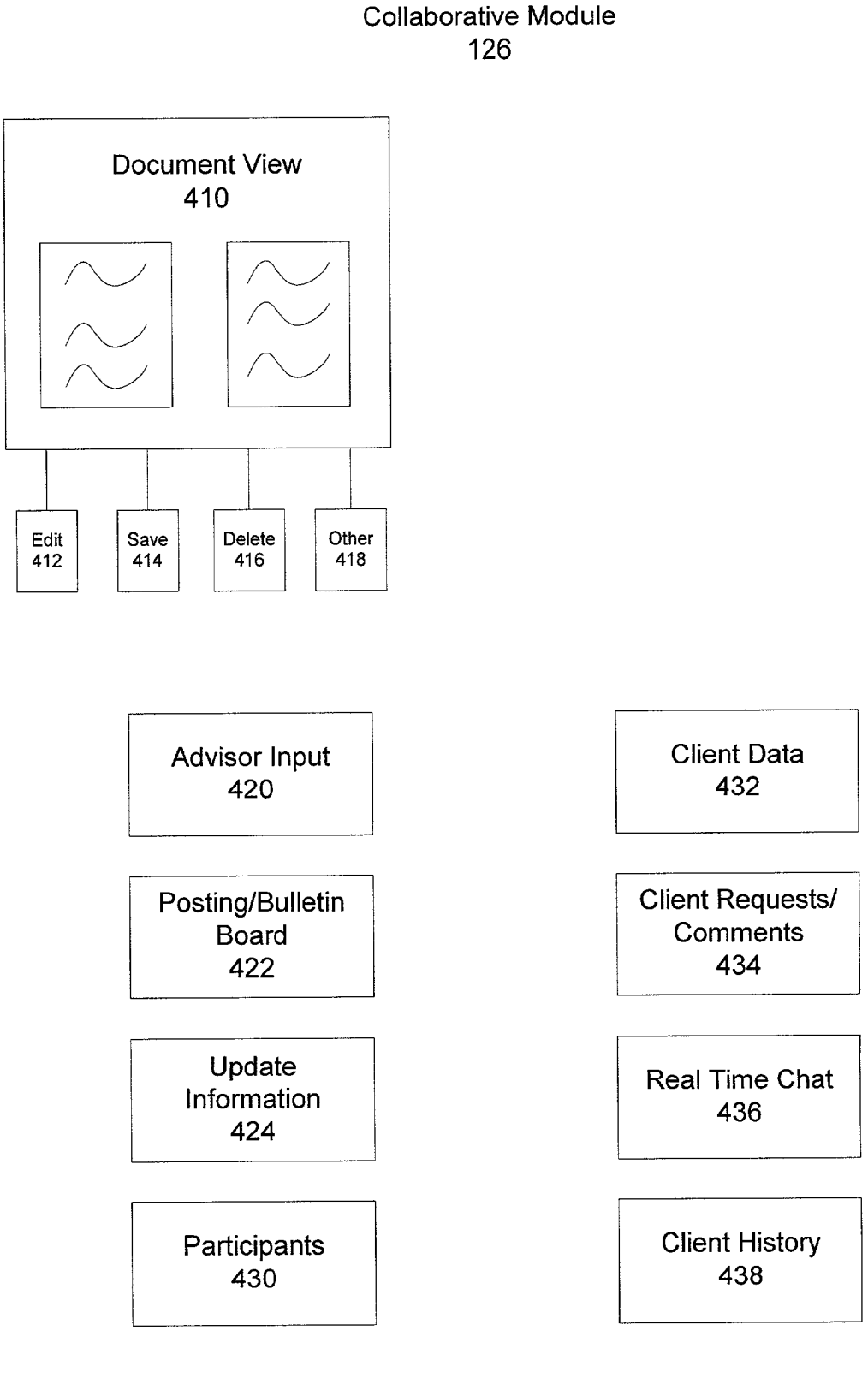
Collaborative Module
126
Document View
410
Edit
412
Save
414
Delete
416
Other
418
Advisor Input
420
Posting/Bulletin Board
422
Update Information
424
Participants
430
Client Data
432
Client Requests/ Comments
434
Real Time Chat
436
Client History
438

FIG. 4

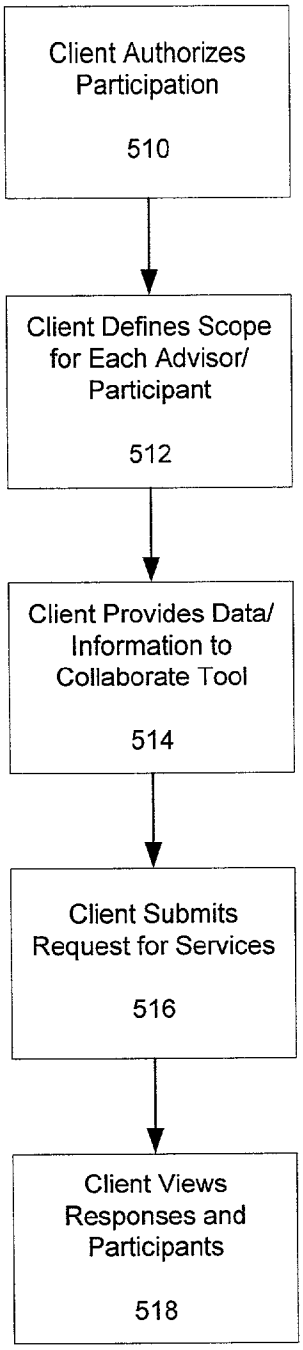
Client Authorizes Participation
510
Client Defines Scope for Each Advisor/ Participant
512
Client Provides Data/ Information to Collaborate Tool
514
Client Submits Request for Services
516
Client Views Responses and Participants
518

FIG. 5

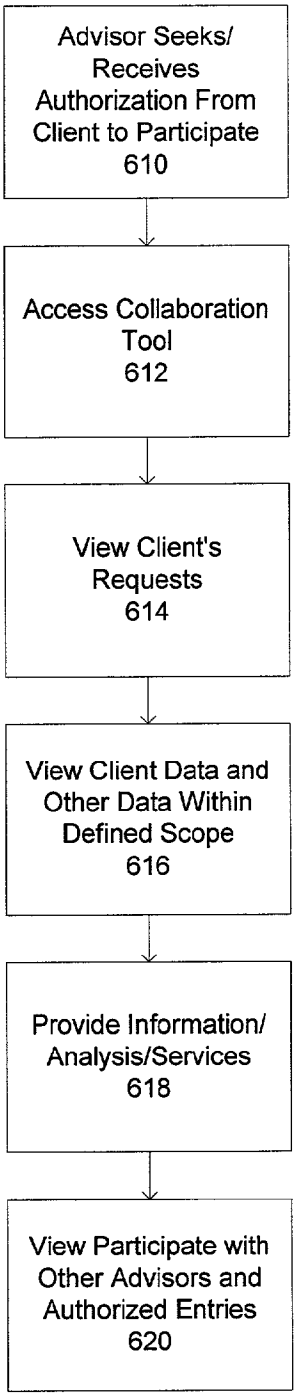
Advisor Seeks/ Receives Authorization From Client to Participate 610
Access Collaboration Tool 612
View Client's Requests 614
View Client Data and Other Data Within Defined Scope 616
Provide Information/ Analysis/Services 618
View Participate with Other Advisors and Authorized Entries 620

FIG. 6

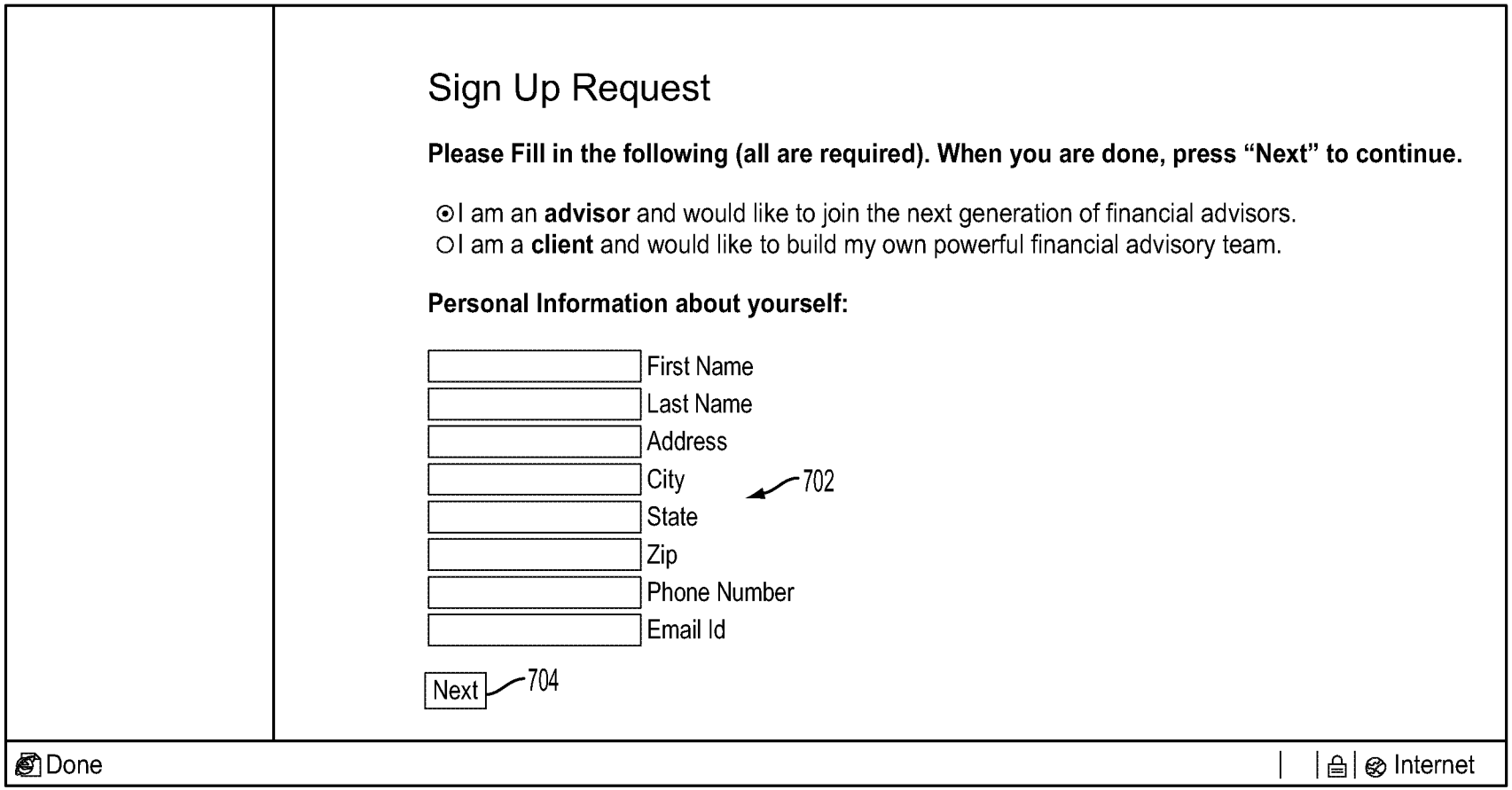


FIG. 7

REPLACEMENT SHEET

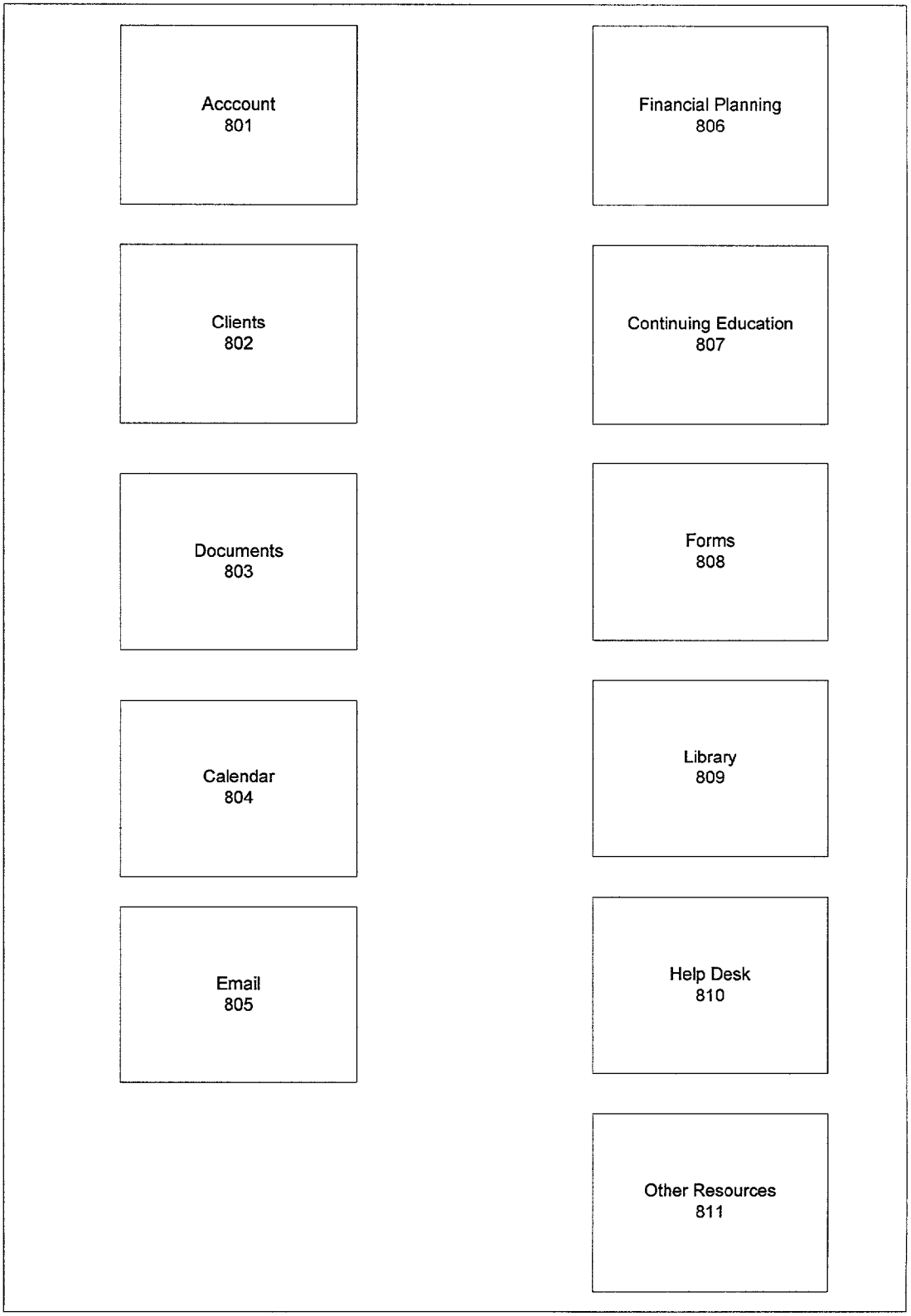
Adviser Module 122
Acccount
801
Financial Planning
806
Clients
802
Continuing Education
807
Documents
803
Forms
808
Calendar
804
Library
809
Email
805
Help Desk
810
Other Resources
811

FIG. 8

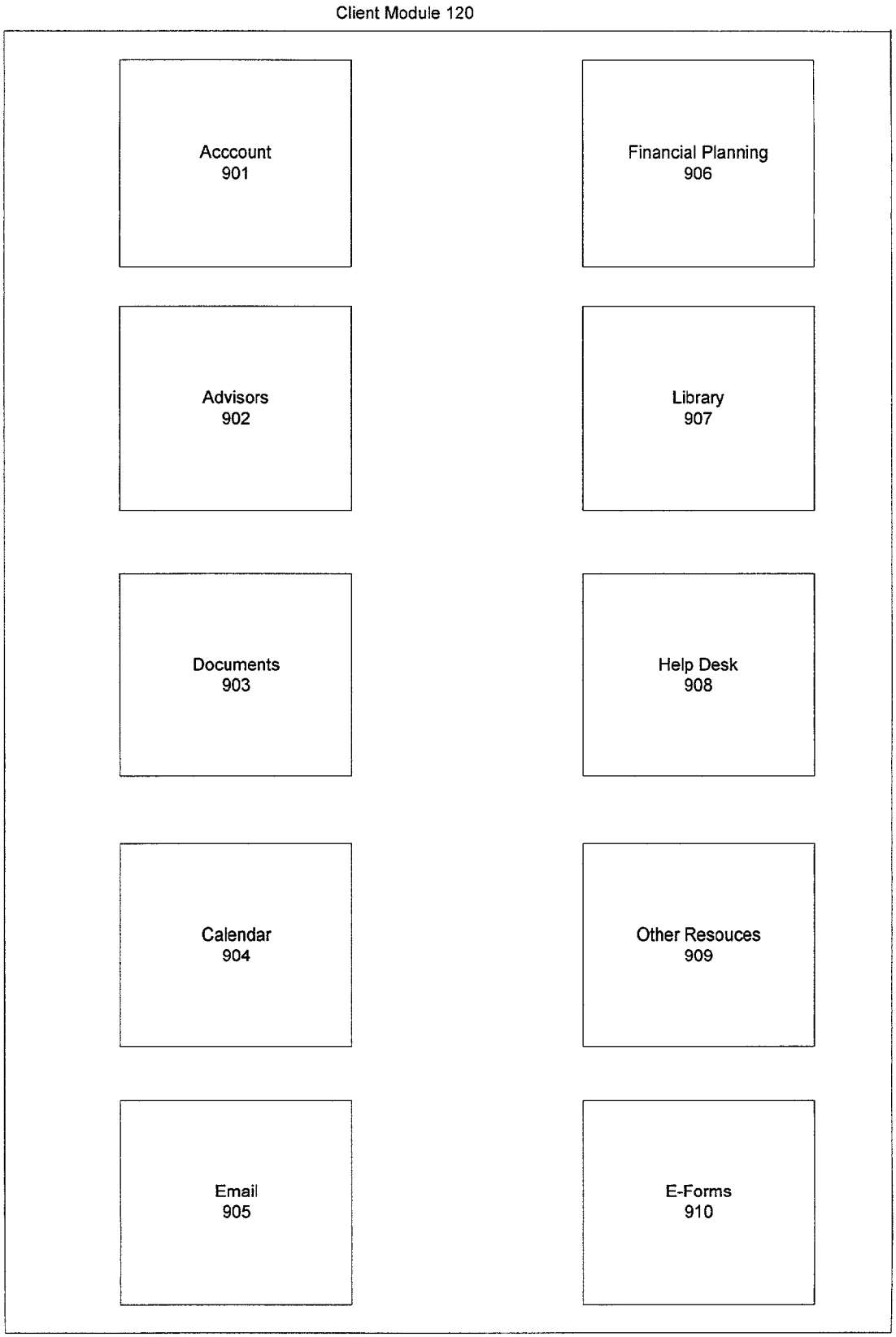
Client Module 120
Acccount
901
Financial Planning
906
Advisors
902
Library
907
Documents
903
Help Desk
908
Calendar
904
Other Resouces
909
Email
905
E-Forms
910

FIG. 9

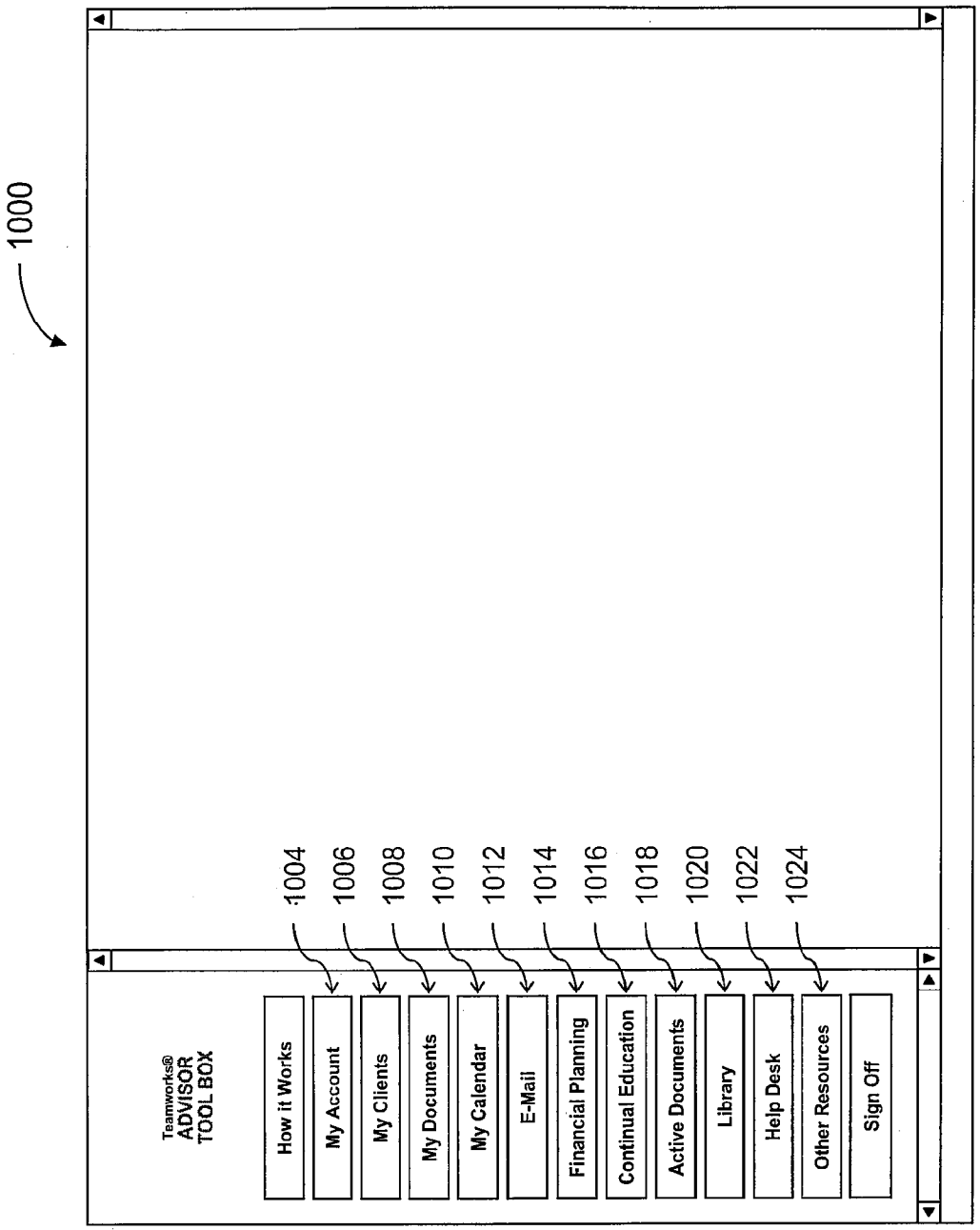
1000
1040
Teamworks®
ADVISOR
TOOL BOX
How it Works
My Account
My Clients
My Documents
My Calendar
E-Mail
Financial Planning
Continual Education
Active Documents
Library
Help Desk
Other Resources
Sign Off
1004
1006
1008
1010
1012
1014
1016
1018
1020
1022
1024

FIG. 10

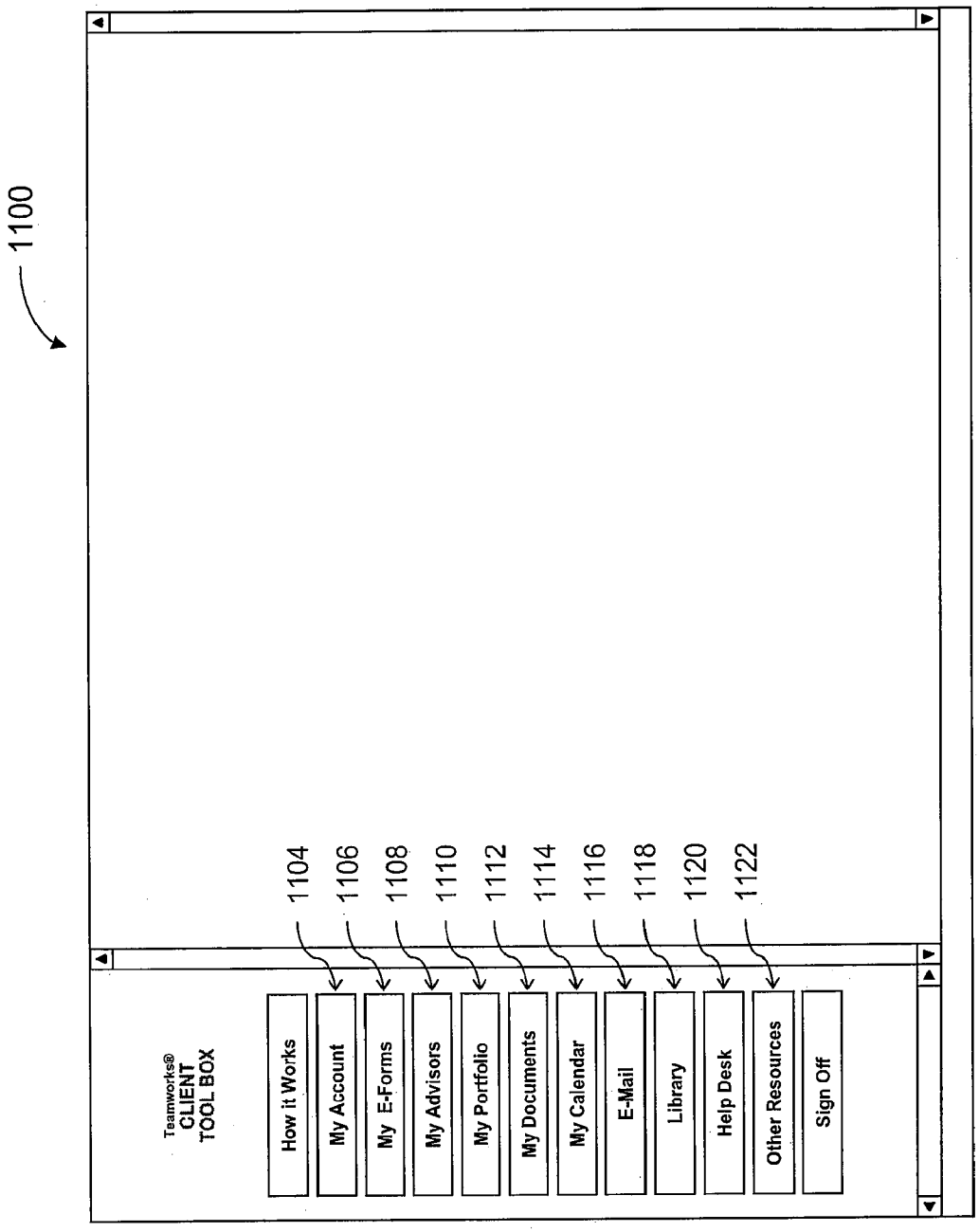
1100
1140
Teamworks®
CLIENT
TOOL BOX
How it Works
My Account
My E-Forms
My Advisors
My Portfolio
My Documents
My Calendar
E-Mail
Library
Help Desk
Other Resources
Sign Off
1104
1106
1108
1110
1112
1114
1116
1118
1120
1122

FIG. 11

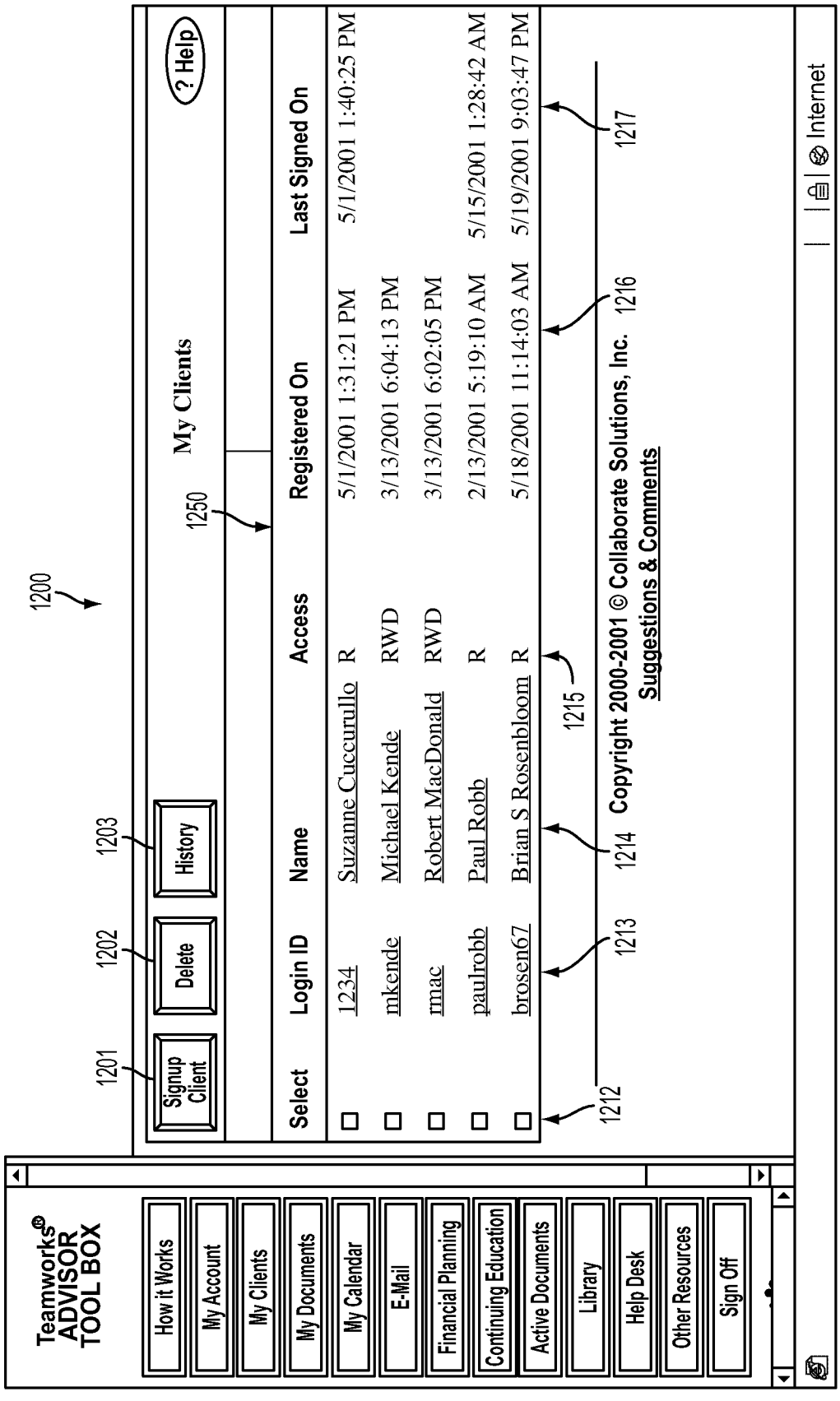
1200
1201
1202
1203
1250
Teamworks® ADVISOR TOOL BOX
How it Works
My Account
My Clients
My Documents
My Calendar
E-Mail
Financial Planning
Continuing Education
Active Documents
Library
Help Desk
Other Resources
Sign Off
Signup Client
Delete
History
My Clients
? Help
Select
Login ID
Name
Access
Registered On
Last Signed On
1234
Suzanne Cuccurullo
R
5/1/2001 1:31:21 PM
5/1/2001 1:40:25 PM
mkende
Michael Kende
RWD
3/13/2001 6:04:13 PM
rmac
Robert MacDonald
RWD
3/13/2001 6:02:05 PM
paulrobb
Paul Robb
R
2/13/2001 5:19:10 AM
5/15/2001 1:28:42 AM
brosen67
Brian S Rosenbloom
R
5/18/2001 11:14:03 AM
5/19/2001 9:03:47 PM
1212
1213
1214
1215
1216
1217
Copyright 2000-2001 © Collaborate Solutions, Inc.
Suggestions & Comments
Internet

FIG. 12

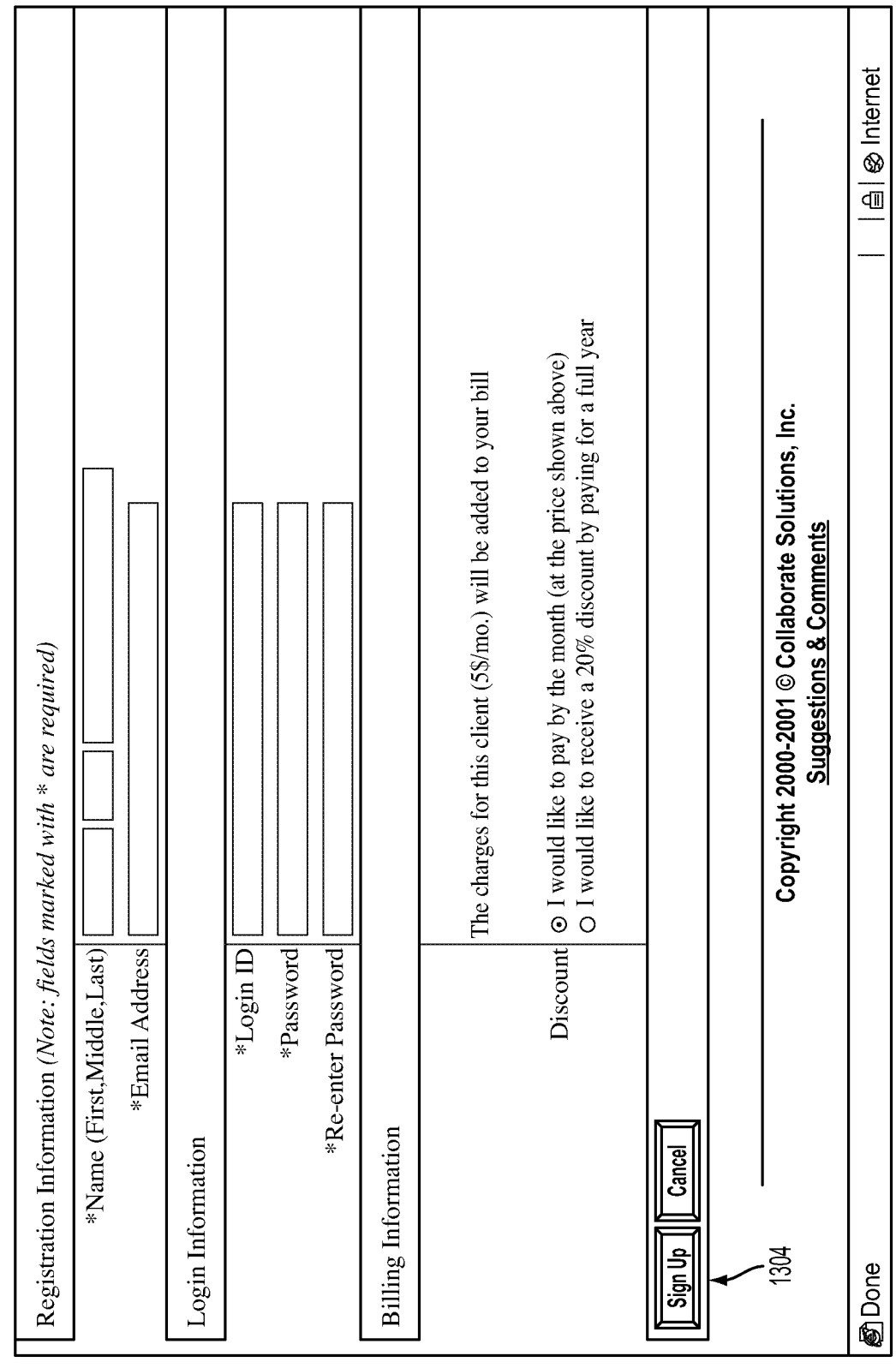
1300
Registration Information (Note: fields marked with * are required)
*Name (First,Middle,Last)
*Email Address
Login Information
*Login ID
*Password
*Re-enter Password
Billing Information
The charges for this client (5$/mo.) will be added to your bill
Discount
I would like to pay by the month (at the price shown above)
I would like to receive a 20% discount by paying for a full year
Sign Up
Cancel
1304
Copyright 2000-2001 © Collaborate Solutions, Inc.
Suggestions & Comments
Done
Internet

FIG. 13

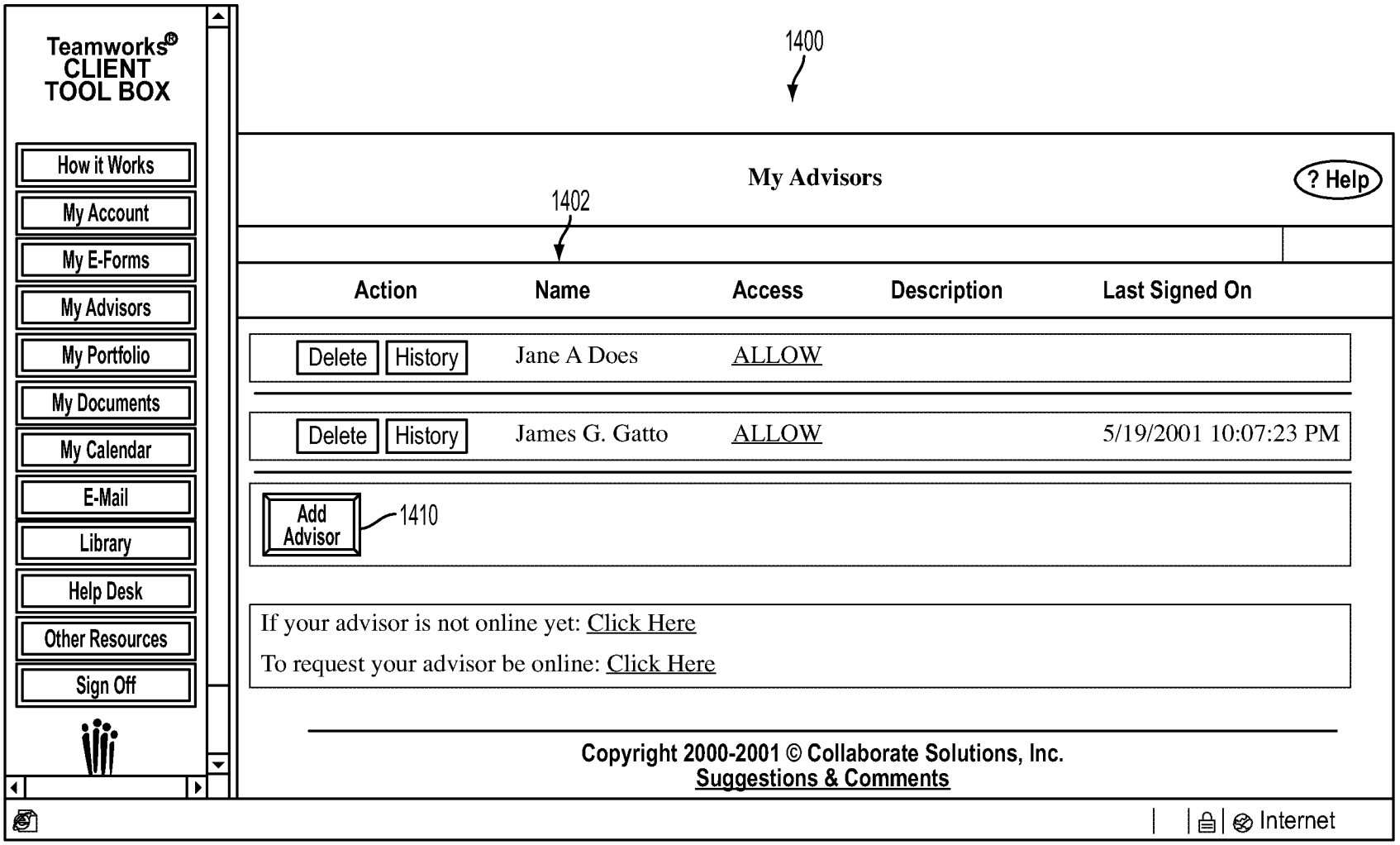


FIG. 14

REPLACEMENT SHEET

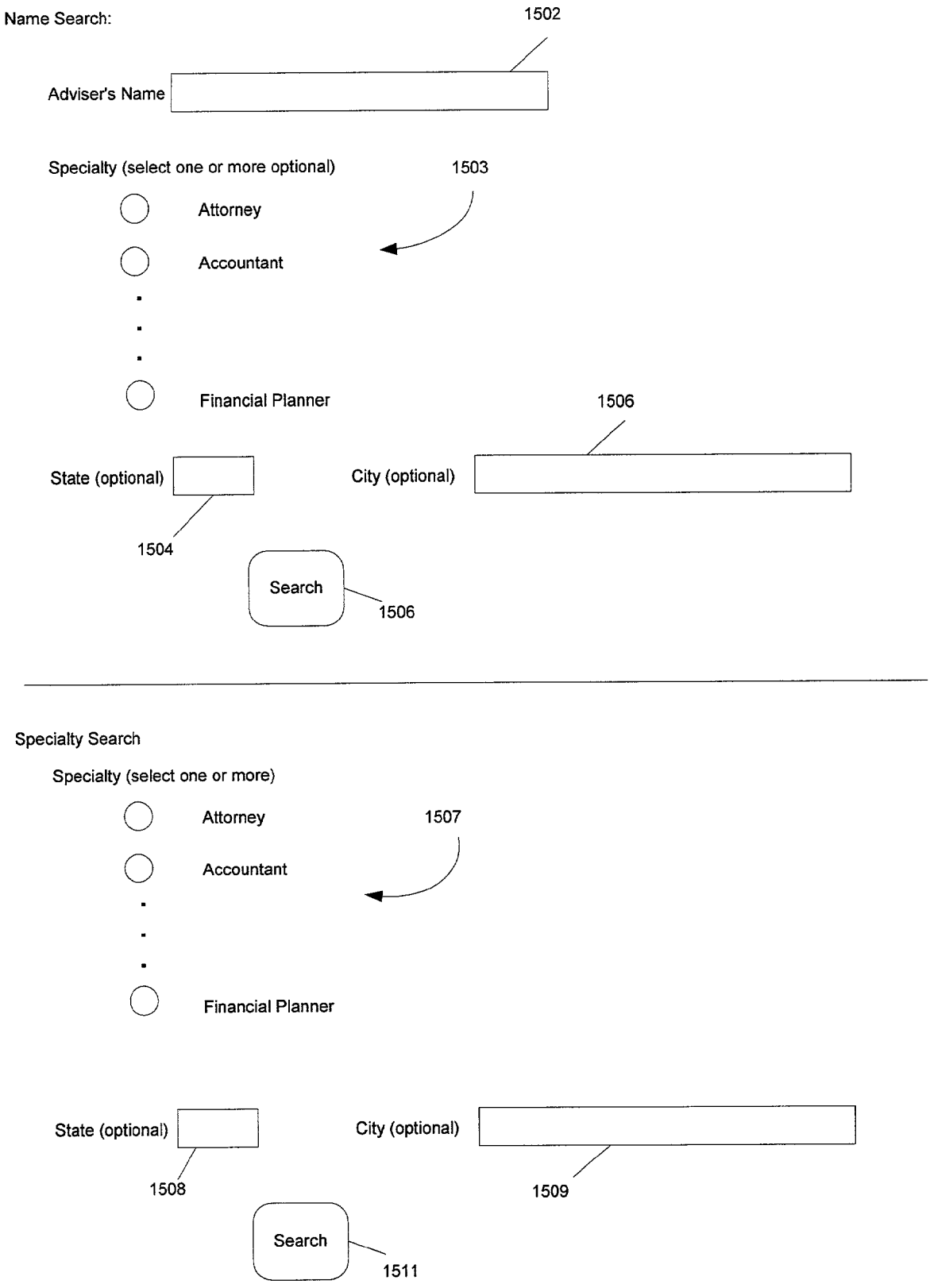
Name Search:
1502
Adviser's Name
Specialty (select one or more optional)
1503
Attorney
Accountant
Financial Planner
1506
State (optional)
City (optional)
1504
Search
1506
Specialty Search
Specialty (select one or more)
Attorney
1507
Accountant
Financial Planner
State (optional)
City (optional)
1508
1509
Search
1511

**FIG. 15**

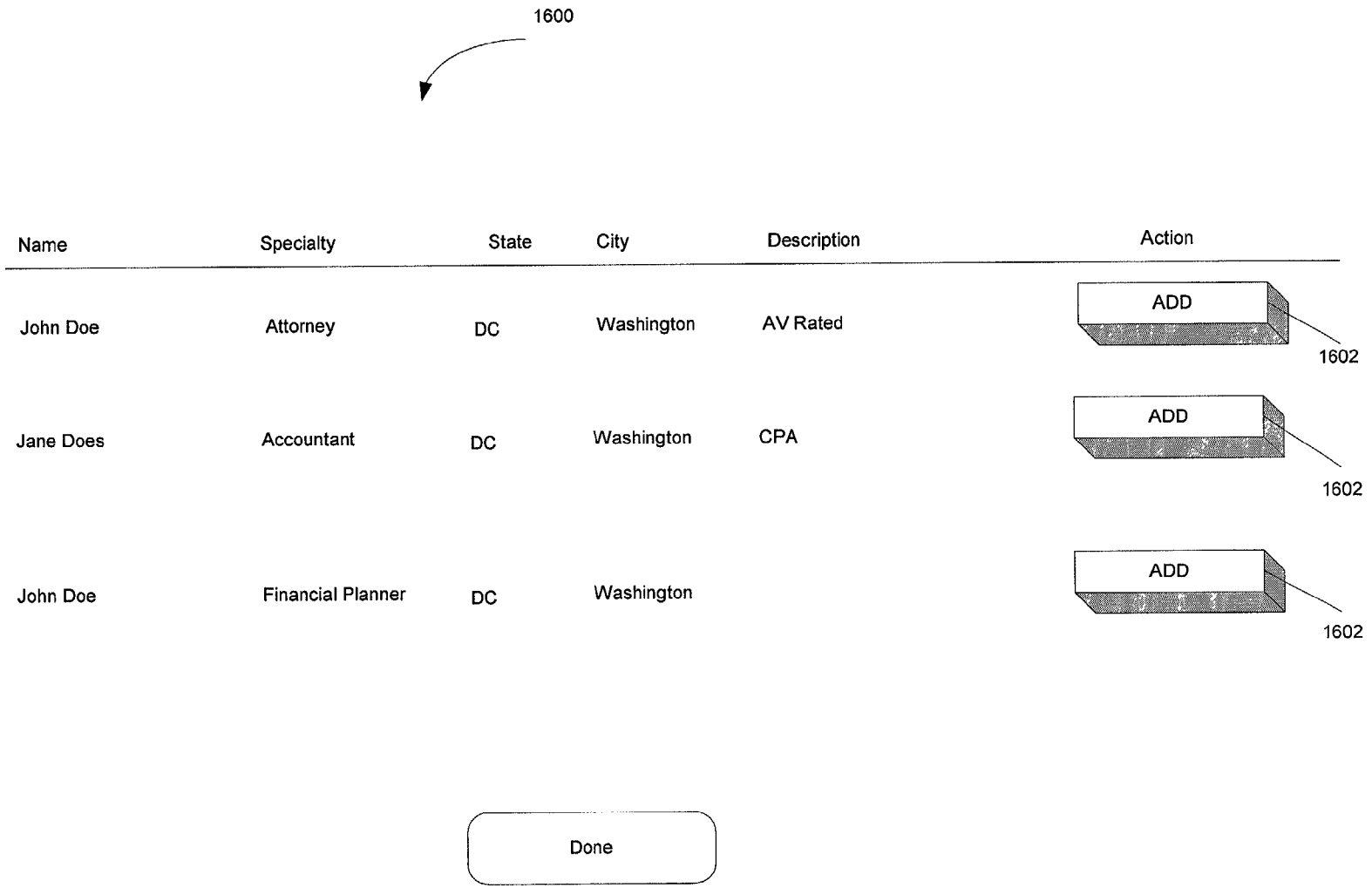


FIG. 16

REPLACEMENT SHEET

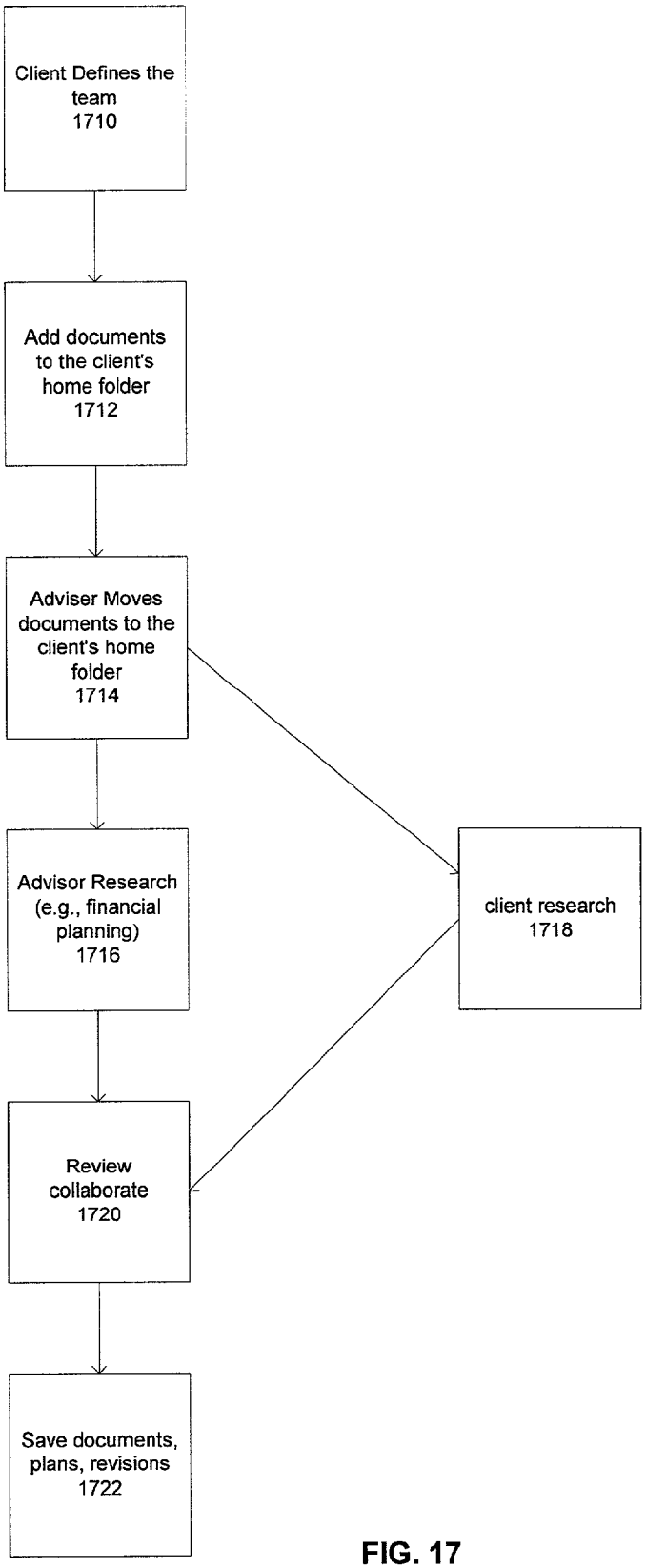
Client Defines the team
1710
Add documents to the client's home folder
1712
Adviser Moves documents to the client's home folder
1714
Advisor Research (e.g., financial planning)
1716
client research
1718
Review collaborate
1720
Save documents, plans, revisions
1722

FIG. 17

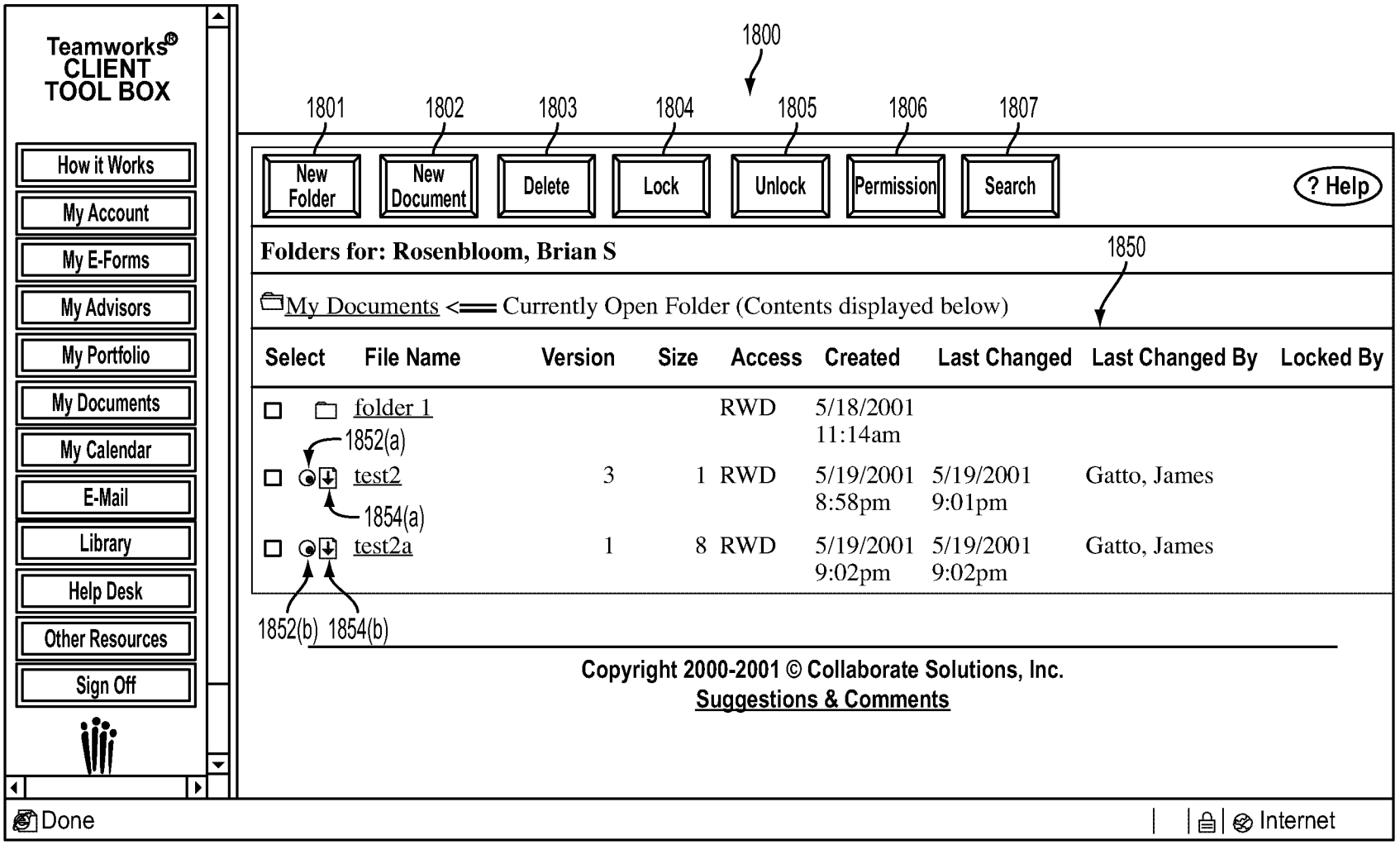


FIG. 18

REPLACEMENT SHEET

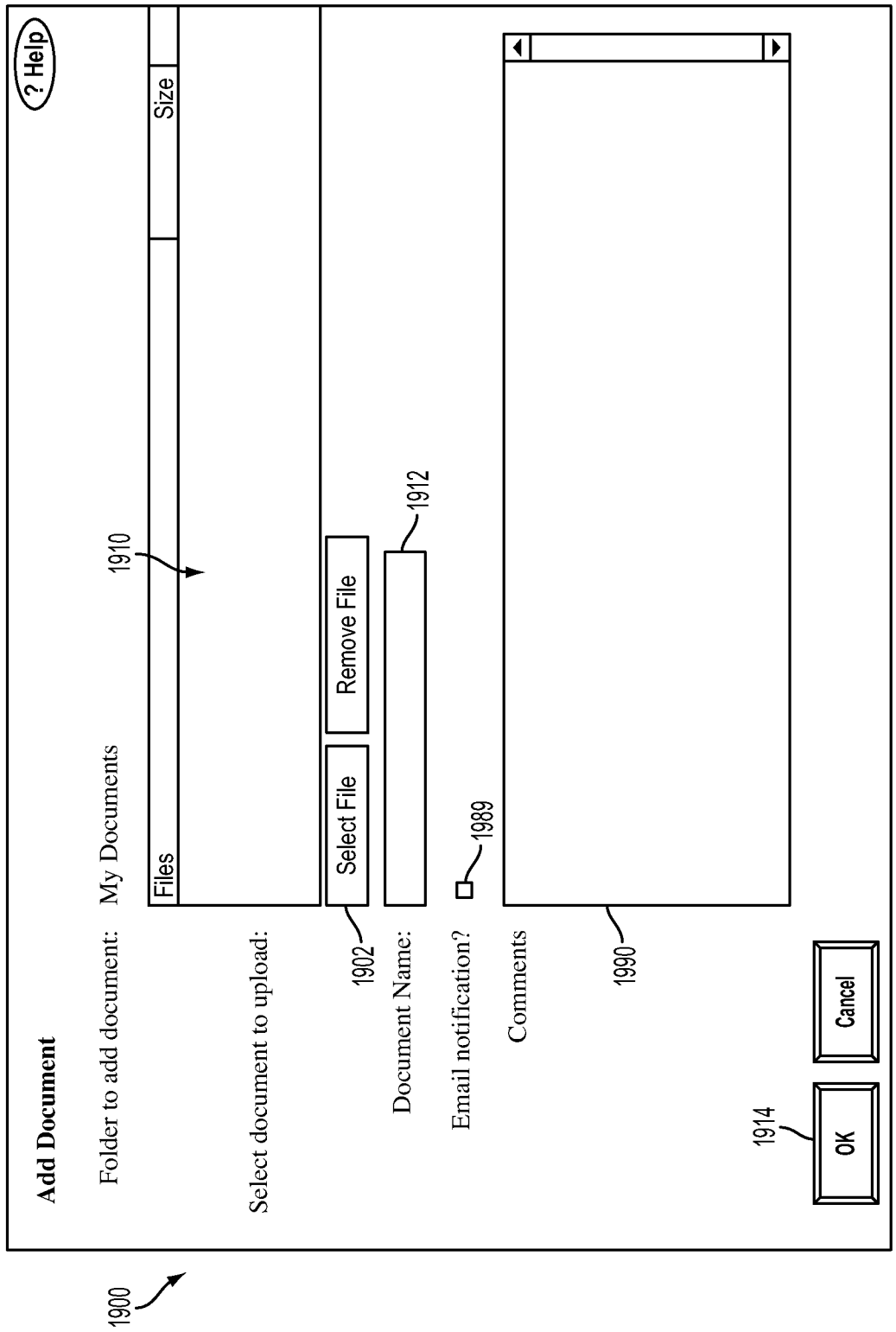
1900
Add Document
? Help
Folder to add document:
My Documents
1910
Files
Size
Select document to upload:
Select File
Remove File
1902
Document Name:
1912
Email notification?
1989
Comments
1990
OK
Cancel
1914

FIG. 19

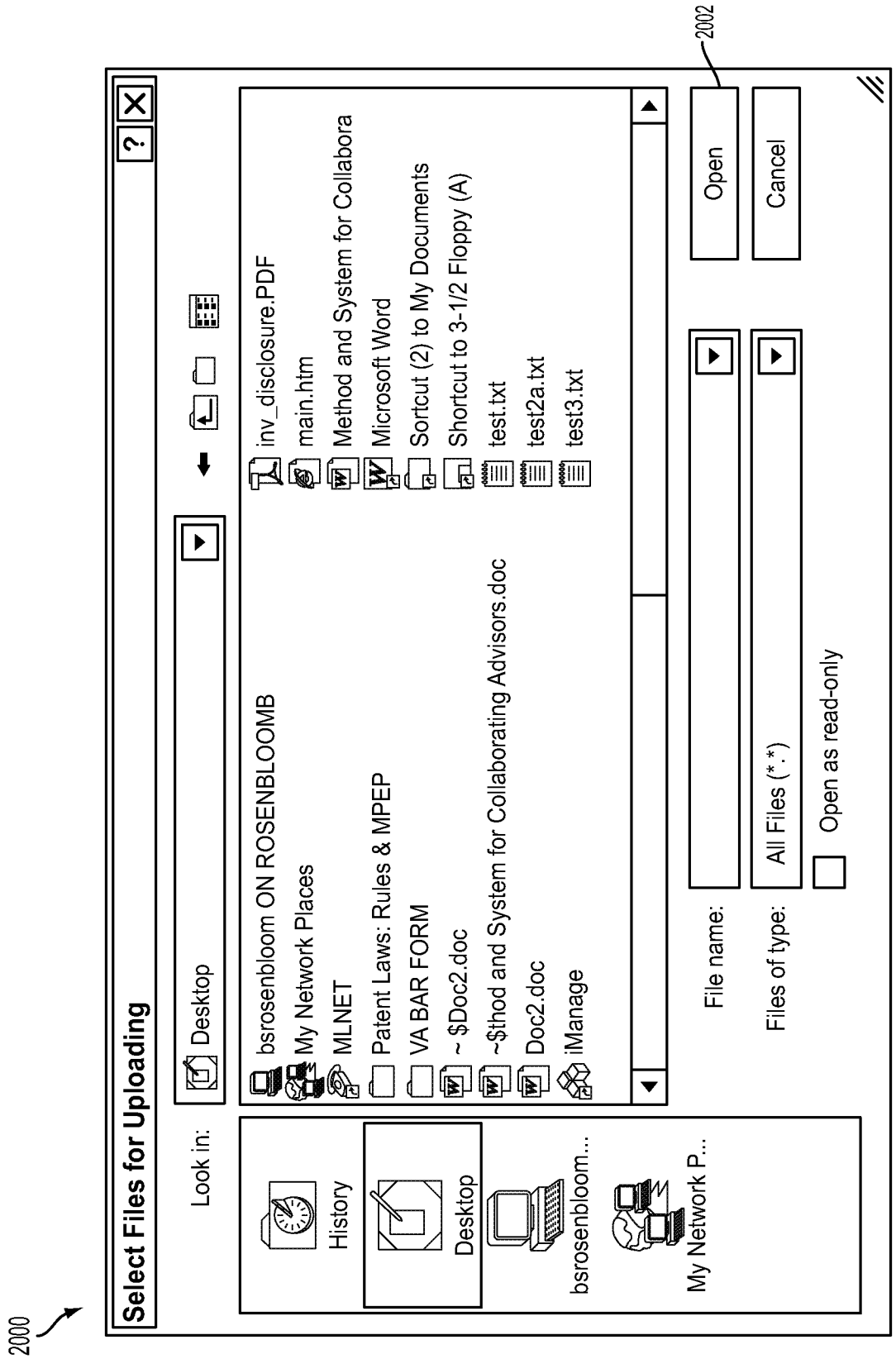
2000
Select Files for Uploading
Look in:
Desktop
bsrosenbloom ON ROSENBLOOMB
My Network Places
MLNET
Patent Laws: Rules & MPEP
VA BAR FORM
~ $Doc2.doc
~$thod and System for Collaborating Advisors.doc
Doc2.doc
iManage
inv_disclosure.PDF
main.htm
Method and System for Collabora
Microsoft Word
Sortcut (2) to My Documents
Shortcut to 3-1/2 Floppy (A)
test.txt
test2a.txt
test3.txt
History
Desktop
bsrosenbloom...
My Network P...
File name:
Files of type:
All Files (*.*)
Open as read-only
Open
Cancel
2002

FIG. 20

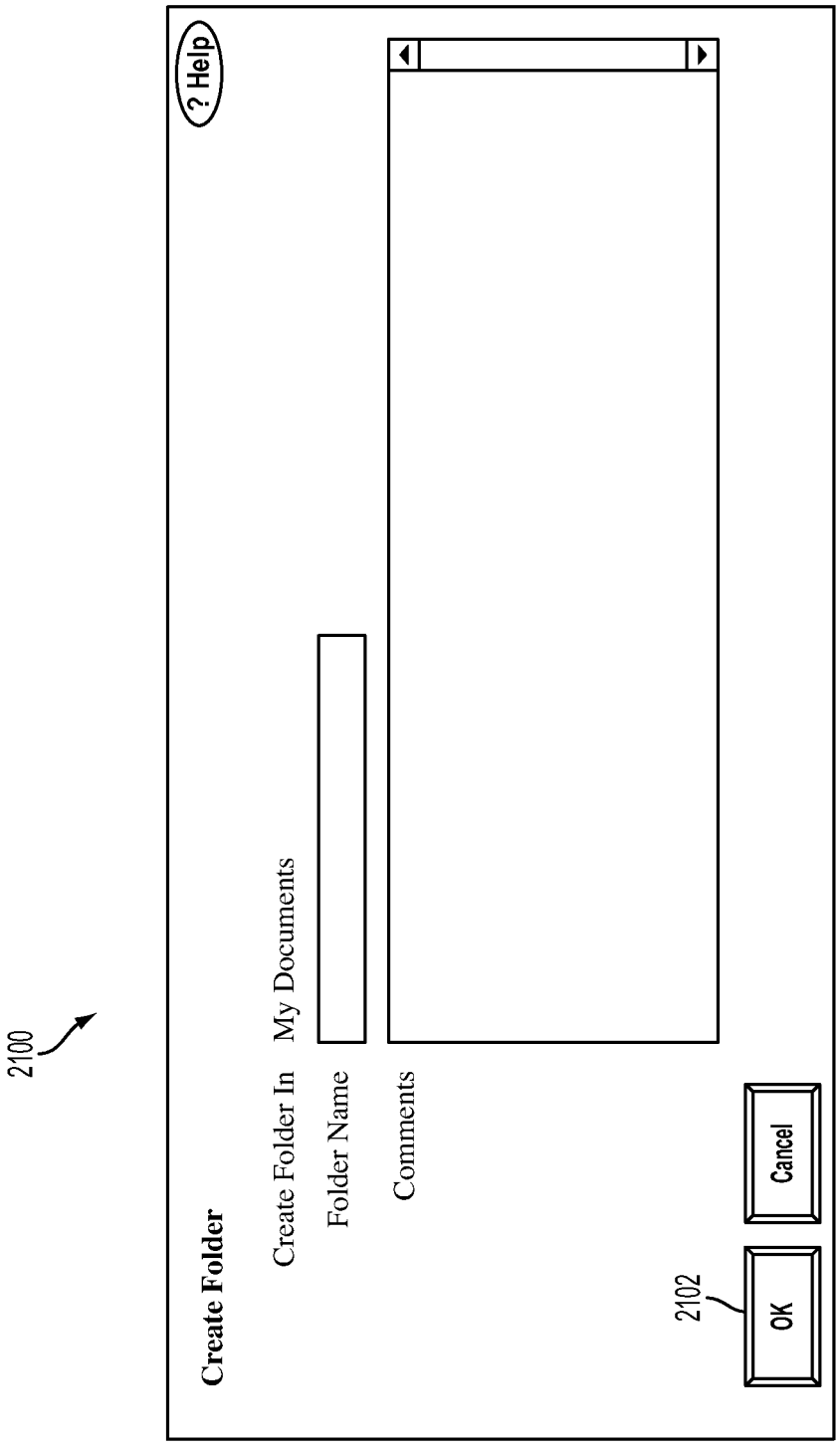
2100
Create Folder
? Help
Create Folder In
My Documents
Folder Name
Comments
2102
OK
Cancel

FIG. 21

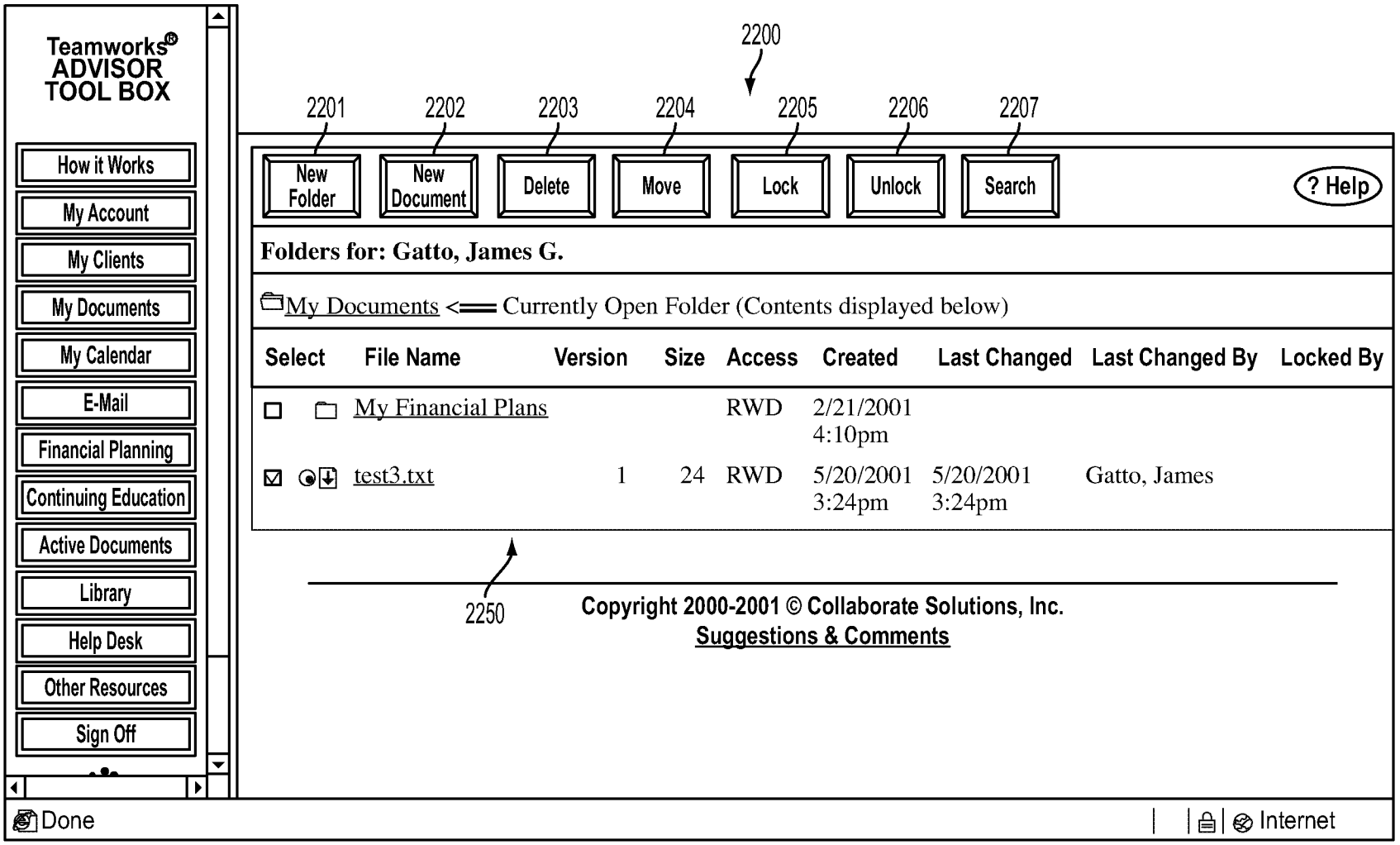


FIG. 22

REPLACEMENT SHEET

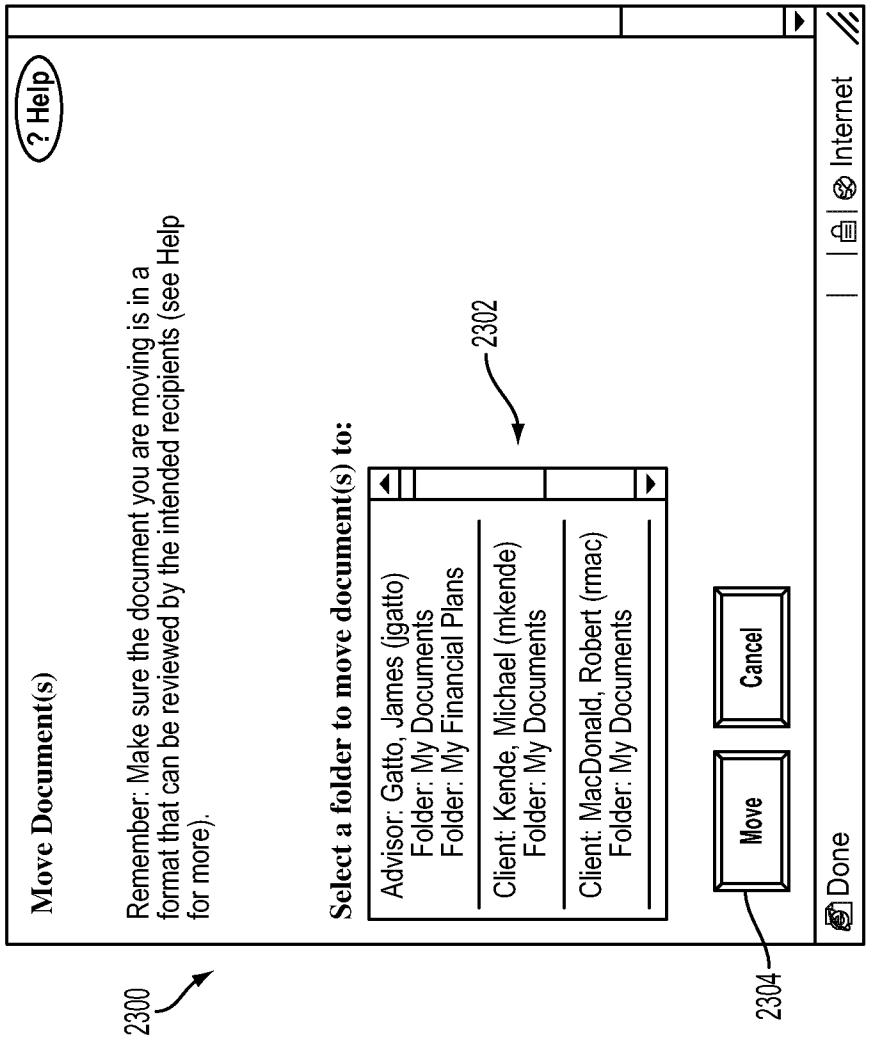
2300
Move Document(s)
? Help
Remember: Make sure the document you are moving is in a format that can be reviewed by the intended recipients (see Help for more).
Select a folder to move document(s) to:
2302
Advisor: Gatto, James (jgatto)
Folder: My Documents
Folder: My Financial Plans
Client: Kende, Michael (mkende)
Folder: My Documents
Client: MacDonald, Robert (rmac)
Folder: My Documents
Move
Cancel
2304
Done
Internet

FIG. 23

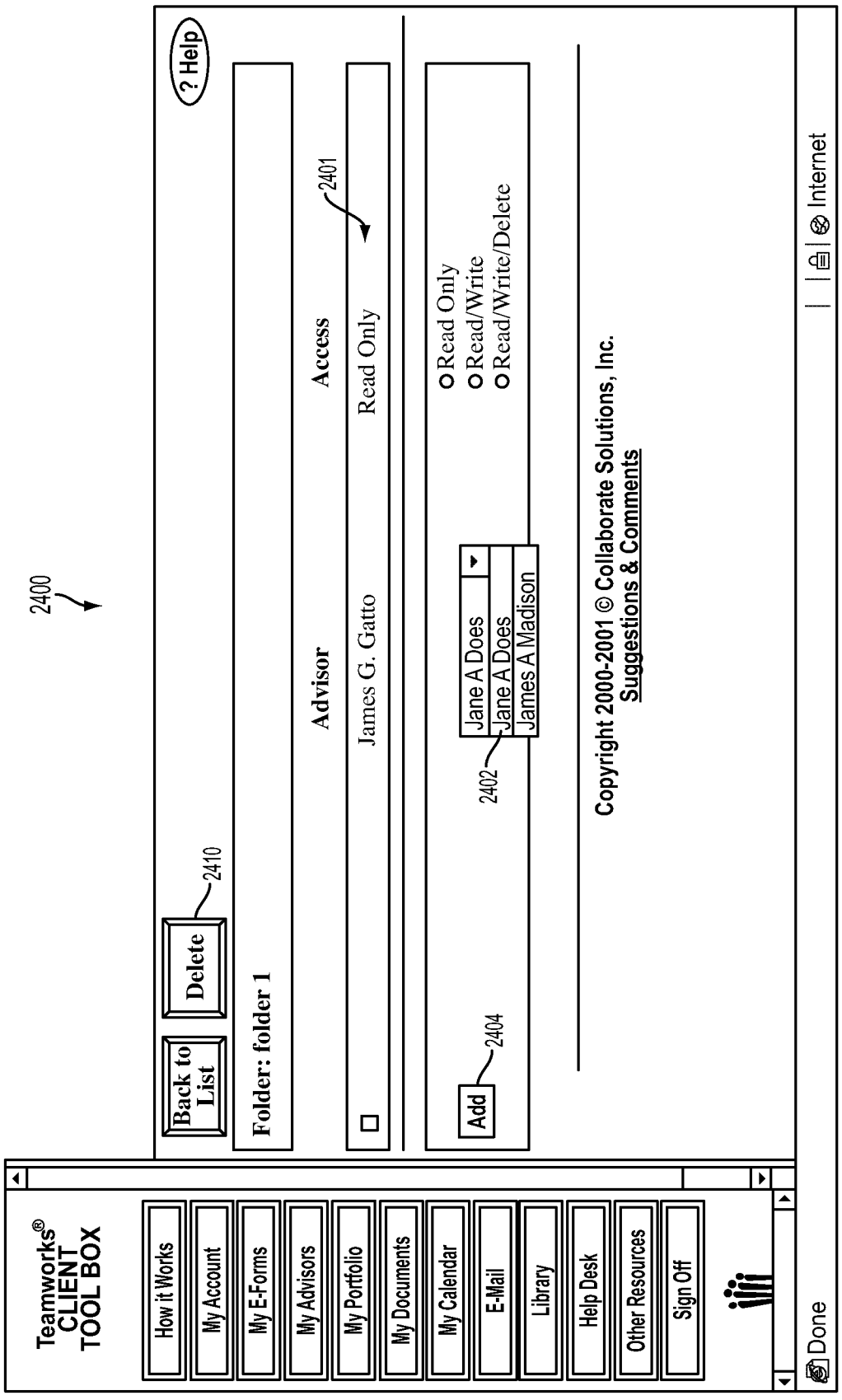
2400
Teamworks®
CLIENT
TOOL BOX
How it Works
My Account
My E-Forms
My Advisors
My Portfolio
My Documents
My Calendar
E-Mail
Library
Help Desk
Other Resources
Sign Off
Back to List
Delete
2410
? Help
Folder: folder 1
Advisor
Access
2401
James G. Gatto
Read Only
Read Only
Read/Write
Read/Write/Delete
Jane A Does
Jane A Does
James A Madison
2402
Add
2404
Copyright 2000-2001 © Collaborate Solutions, Inc.
Suggestions & Comments
Done
Internet

FIG. 24

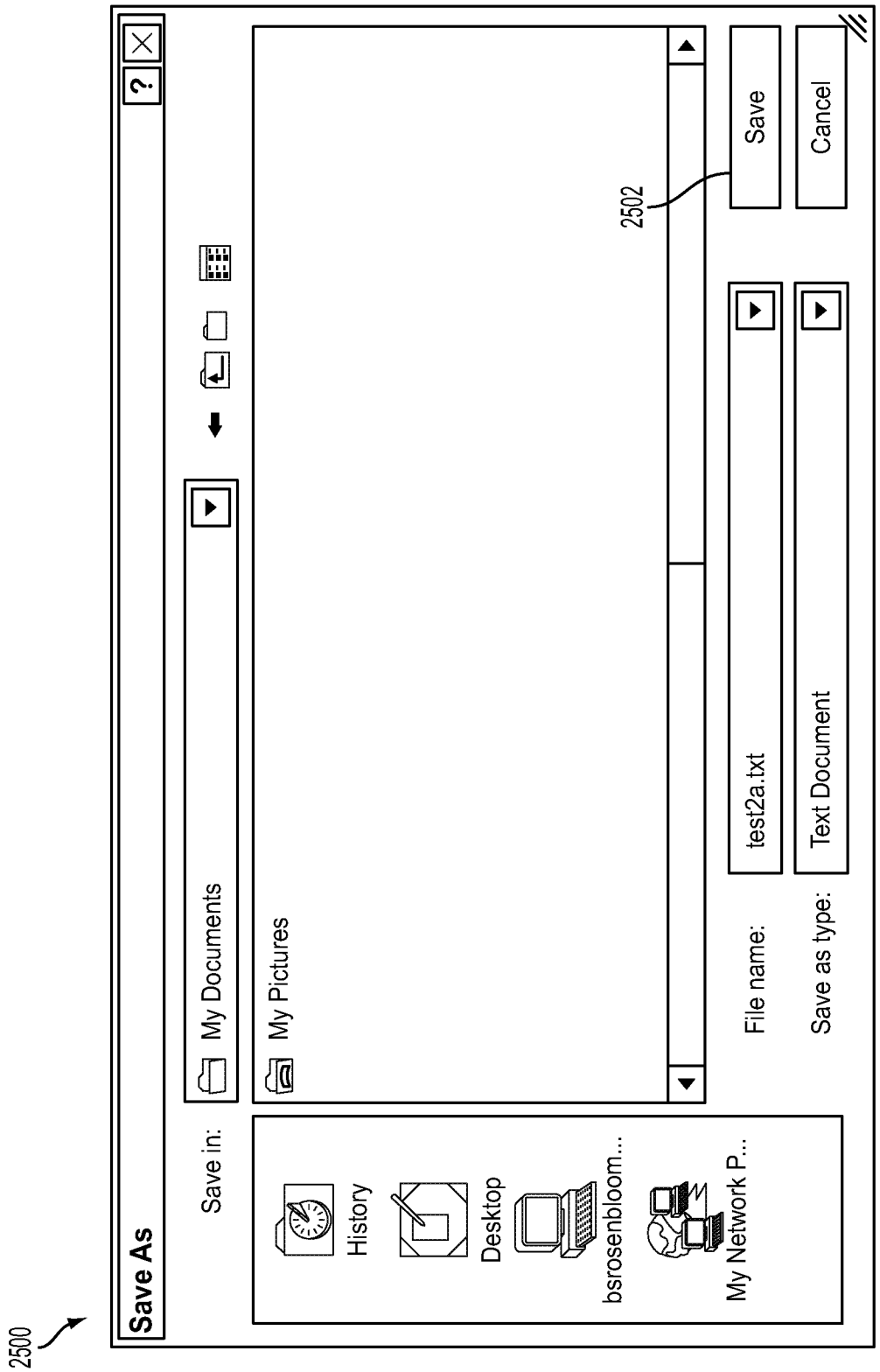
2500
Save As
?
Save in:
My Documents
My Pictures
History
Desktop
bsrosenbloom...
My Network P...
2502
Save
Cancel
File name:
test2a.txt
Save as type:
Text Document

FIG. 25

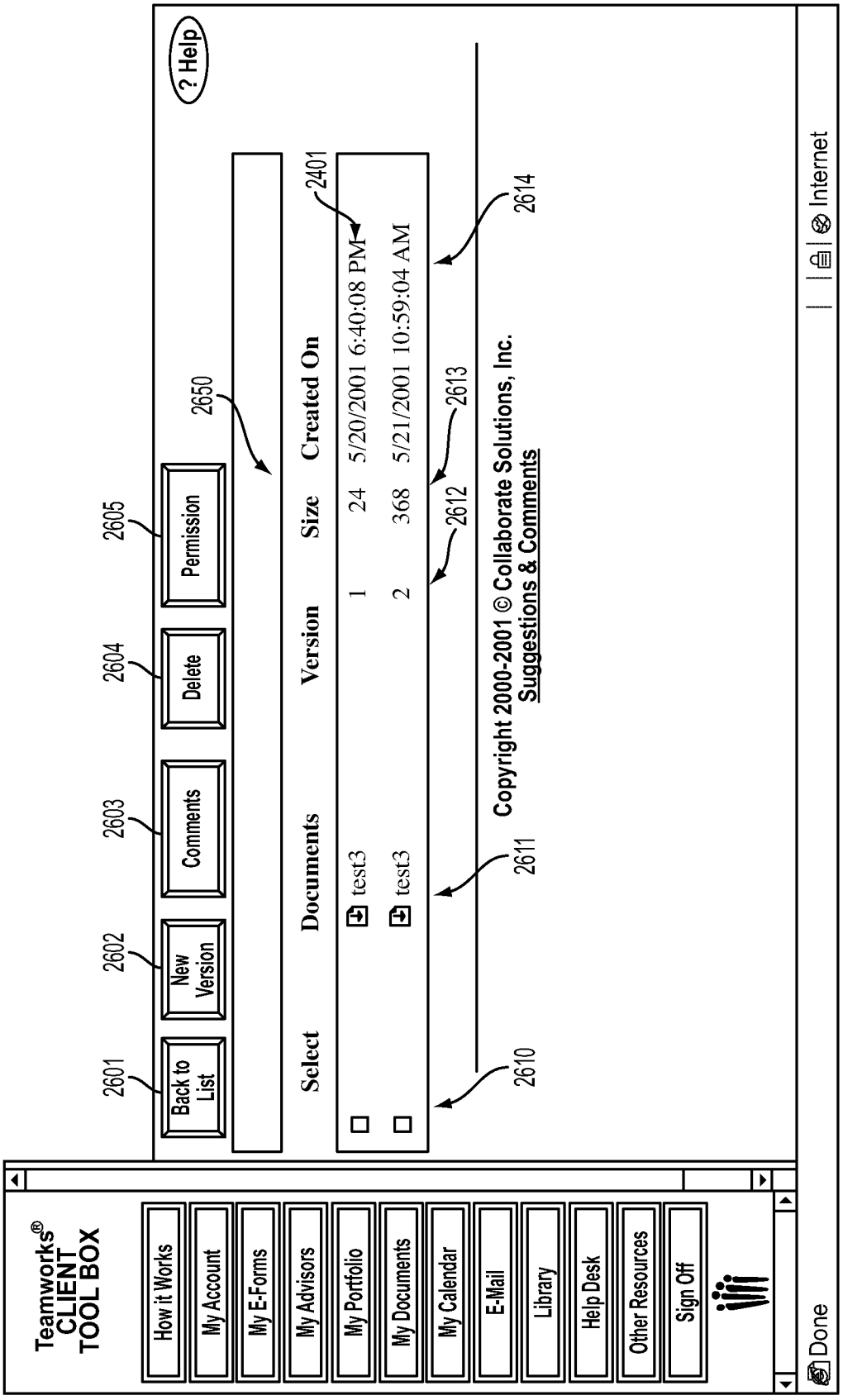
Teamworks®
CLIENT
TOOL BOX
How it Works
My Account
My E-Forms
My Advisors
My Portfolio
My Documents
My Calendar
E-Mail
Library
Help Desk
Other Resources
Sign Off
Done
Internet
Back to List
New Version
Comments
Delete
Permission
? Help
2601
2602
2603
2604
2605
2650
2401
Select
Documents
Version
Size
Created On
test3
1
24
5/20/2001 6:40:08 PM
test3
2
368
5/21/2001 10:59:04 AM
2610
2611
2612
2613
2614
Copyright 2000-2001 © Collaborate Solutions, Inc.
Suggestions & Comments

FIG. 26

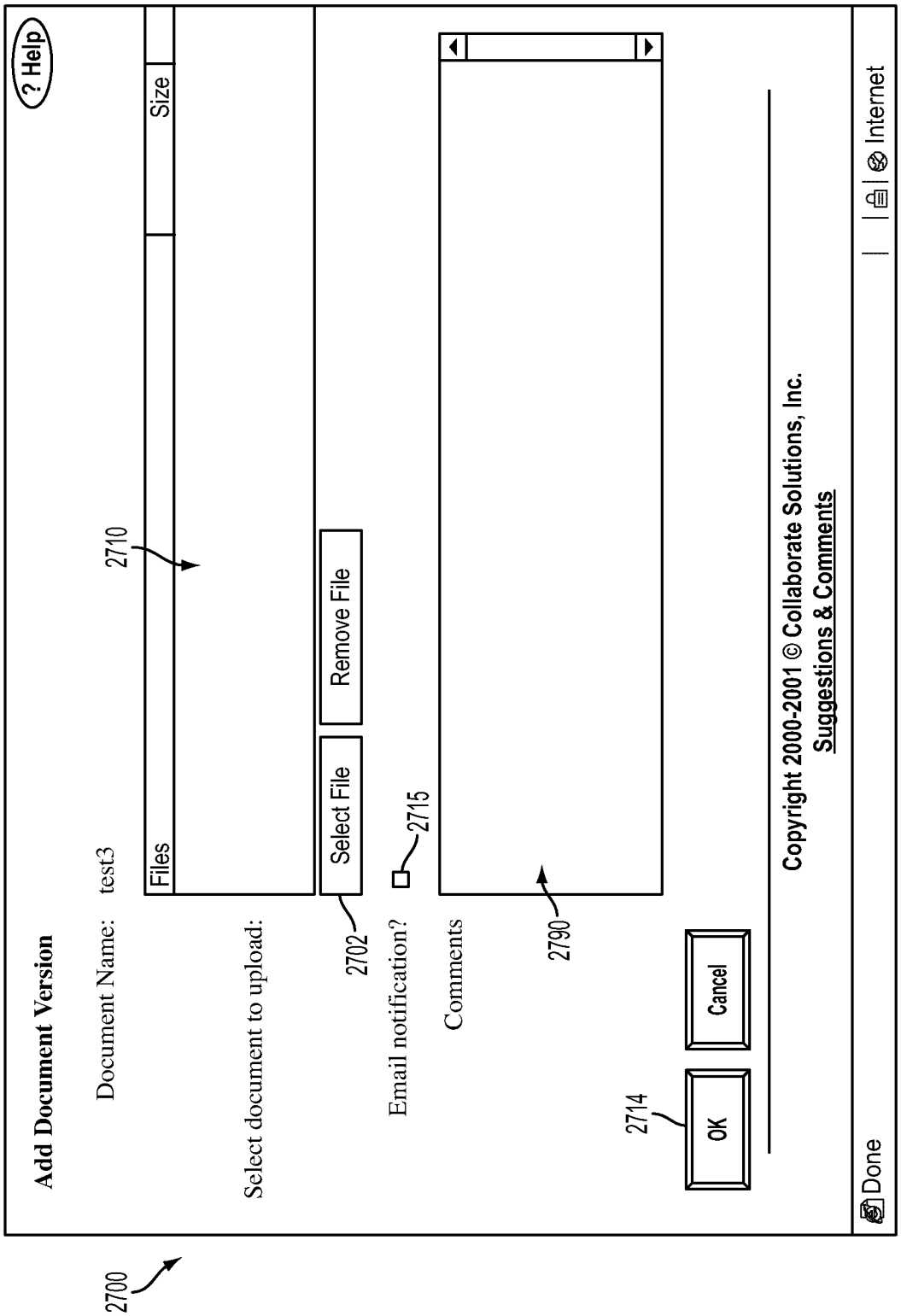
2700
Add Document Version
? Help
Document Name: test3
2710
Files
Size
Select document to upload:
Select File
Remove File
2702
Email notification?
2715
Comments
2790
2714
OK
Cancel
Copyright 2000-2001 © Collaborate Solutions, Inc.
Suggestions & Comments
Done
Internet

FIG. 27

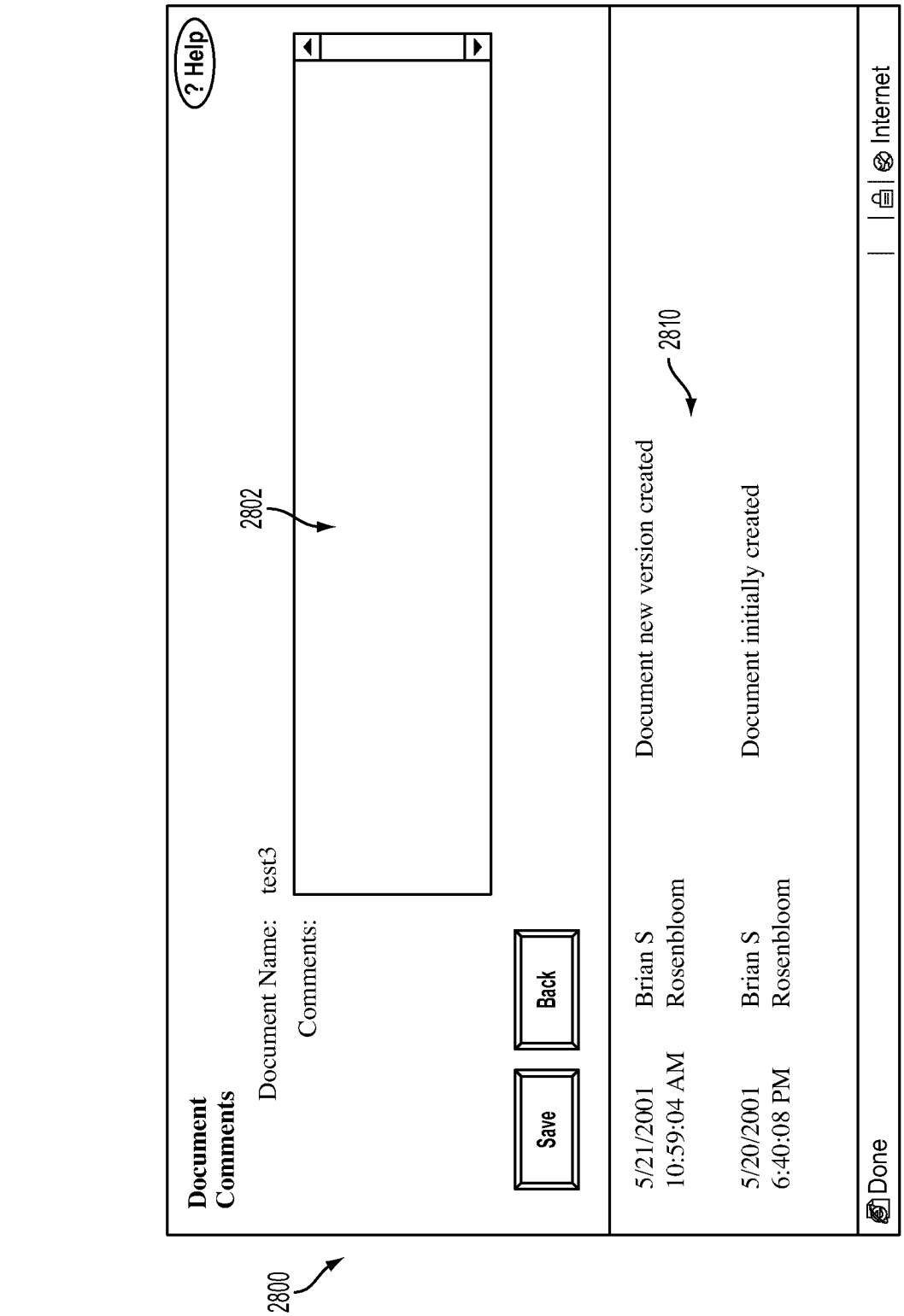
2800
Document Comments
? Help
Document Name: test3
Comments:
2802
Save
Back
5/21/2001 10:59:04 AM Brian S Rosenbloom
Document new version created
2810
5/20/2001 6:40:08 PM Brian S Rosenbloom
Document initially created
Done
Internet

FIG. 28

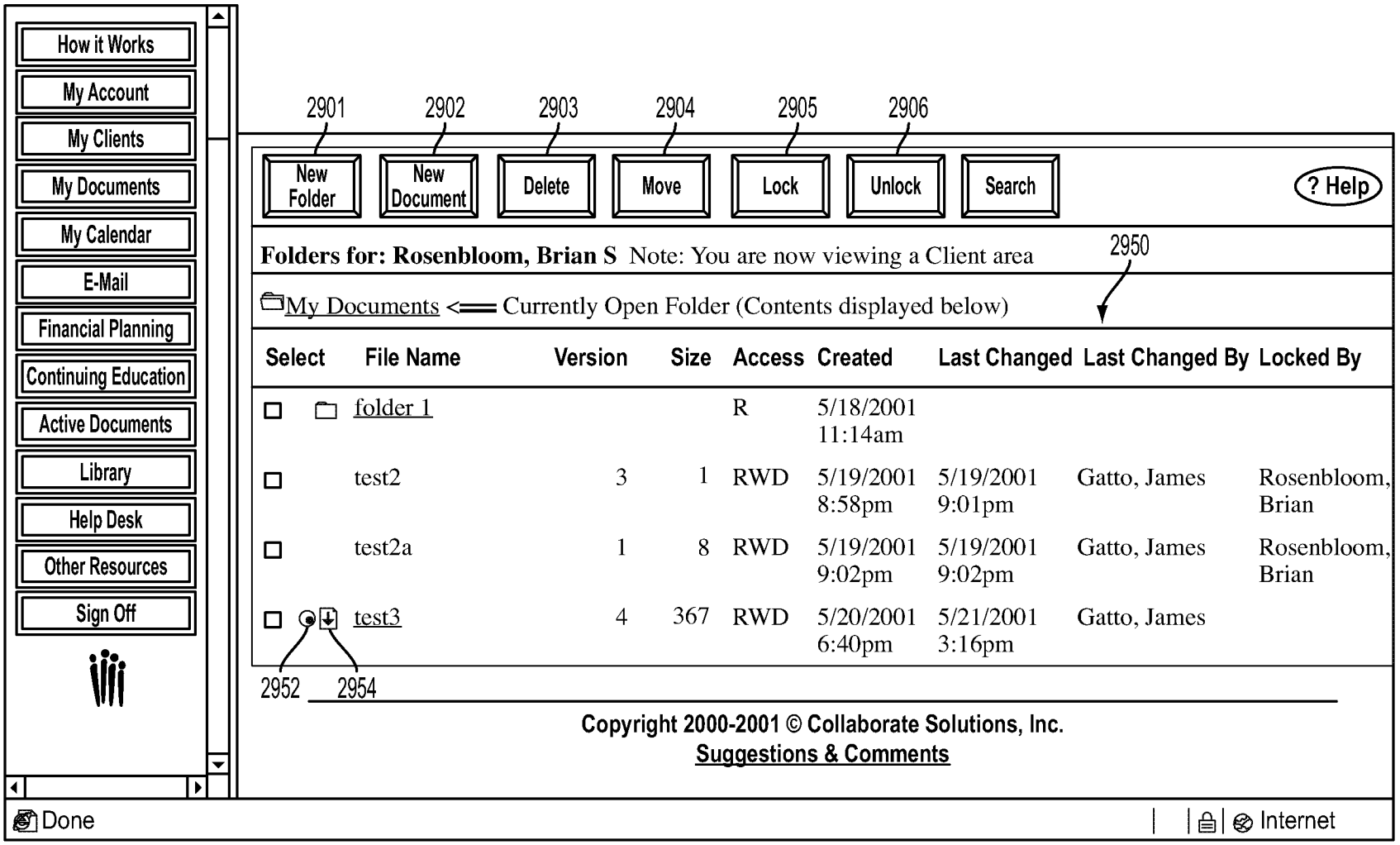


FIG. 29

REPLACEMENT SHEET

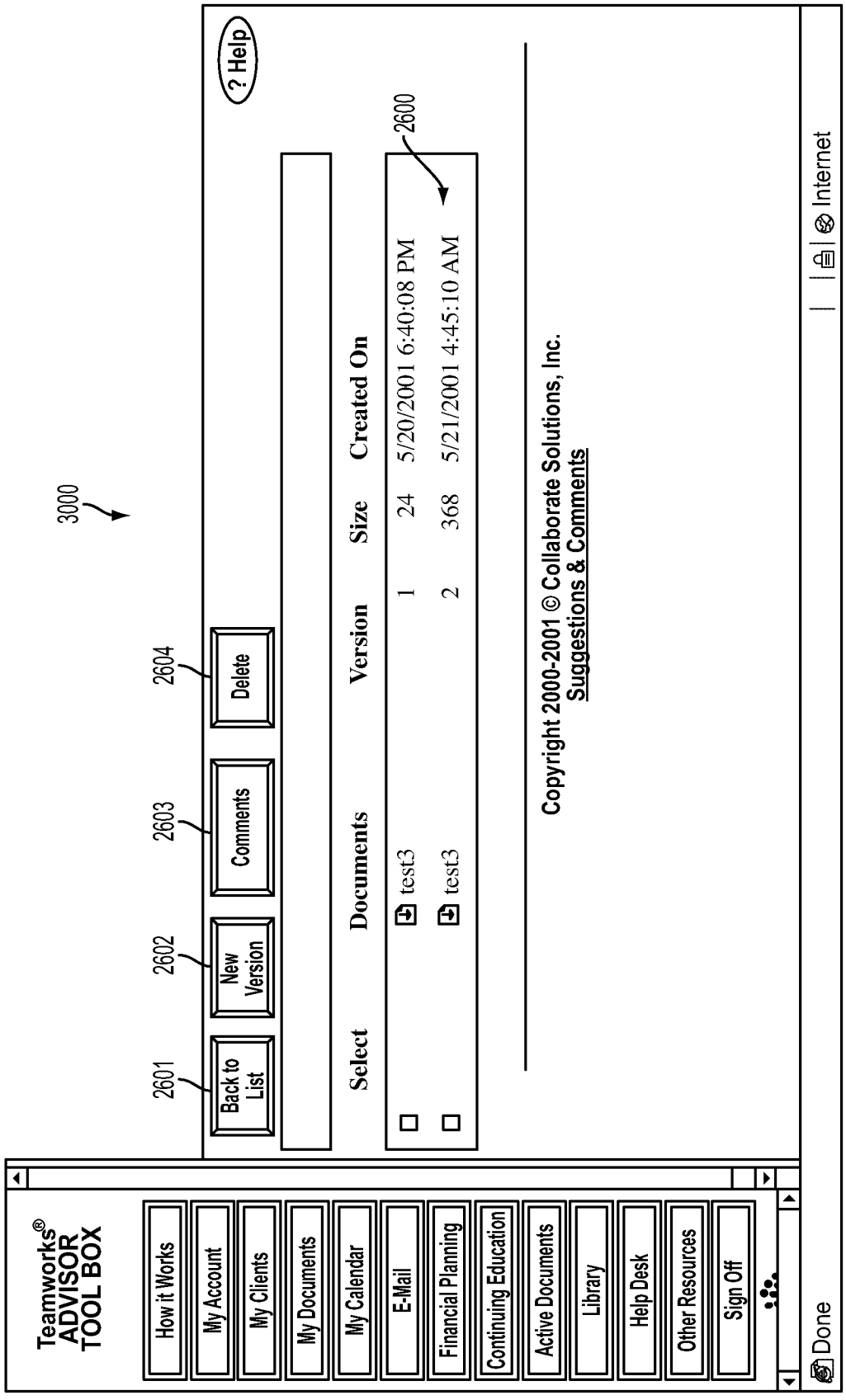
3000
Teamworks® ADVISOR TOOL BOX
How it Works
My Account
My Clients
My Documents
My Calendar
E-Mail
Financial Planning
Continuing Education
Active Documents
Library
Help Desk
Other Resources
Sign Off
Done
Internet
2601
Back to List
2602
New Version
2603
Comments
2604
Delete
? Help
2600
Select
Documents
Version
Size
Created On
test3
1
24
5/20/2001 6:40:08 PM
test3
2
368
5/21/2001 4:45:10 AM
Copyright 2000-2001 © Collaborate Solutions, Inc.
Suggestions & Comments

FIG. 30

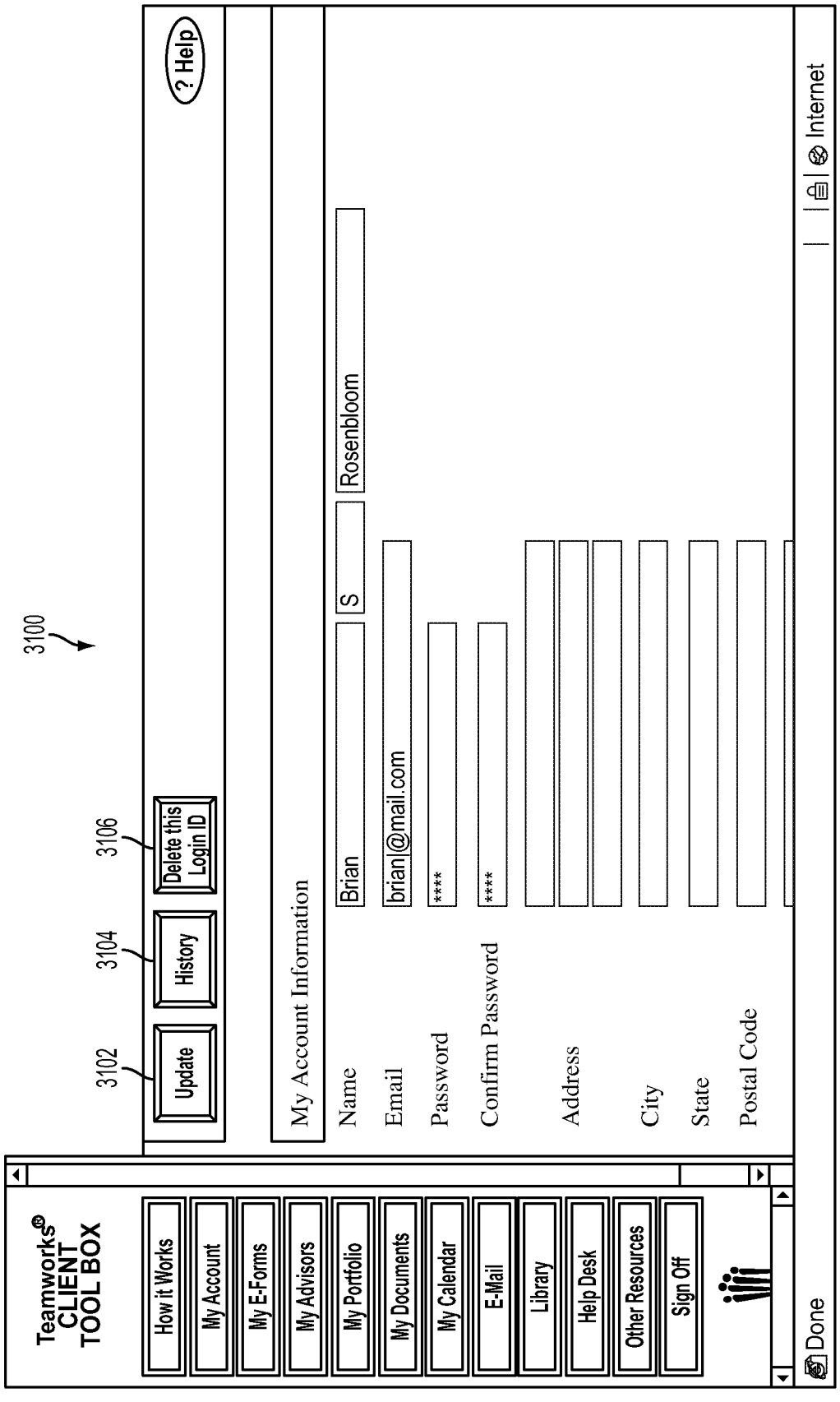
3100
3102
3104
3106
Teamworks®
CLIENT
TOOL BOX
How it Works
My Account
My E-Forms
My Advisors
My Portfolio
My Documents
My Calendar
E-Mail
Library
Help Desk
Other Resources
Sign Off
Update
History
Delete this Login ID
? Help
My Account Information
Name
Email
Password
Confirm Password
Address
City
State
Postal Code
Brian
S
Rosenbloom
brian@mail.com
****
****
Done
Internet

FIG. 31

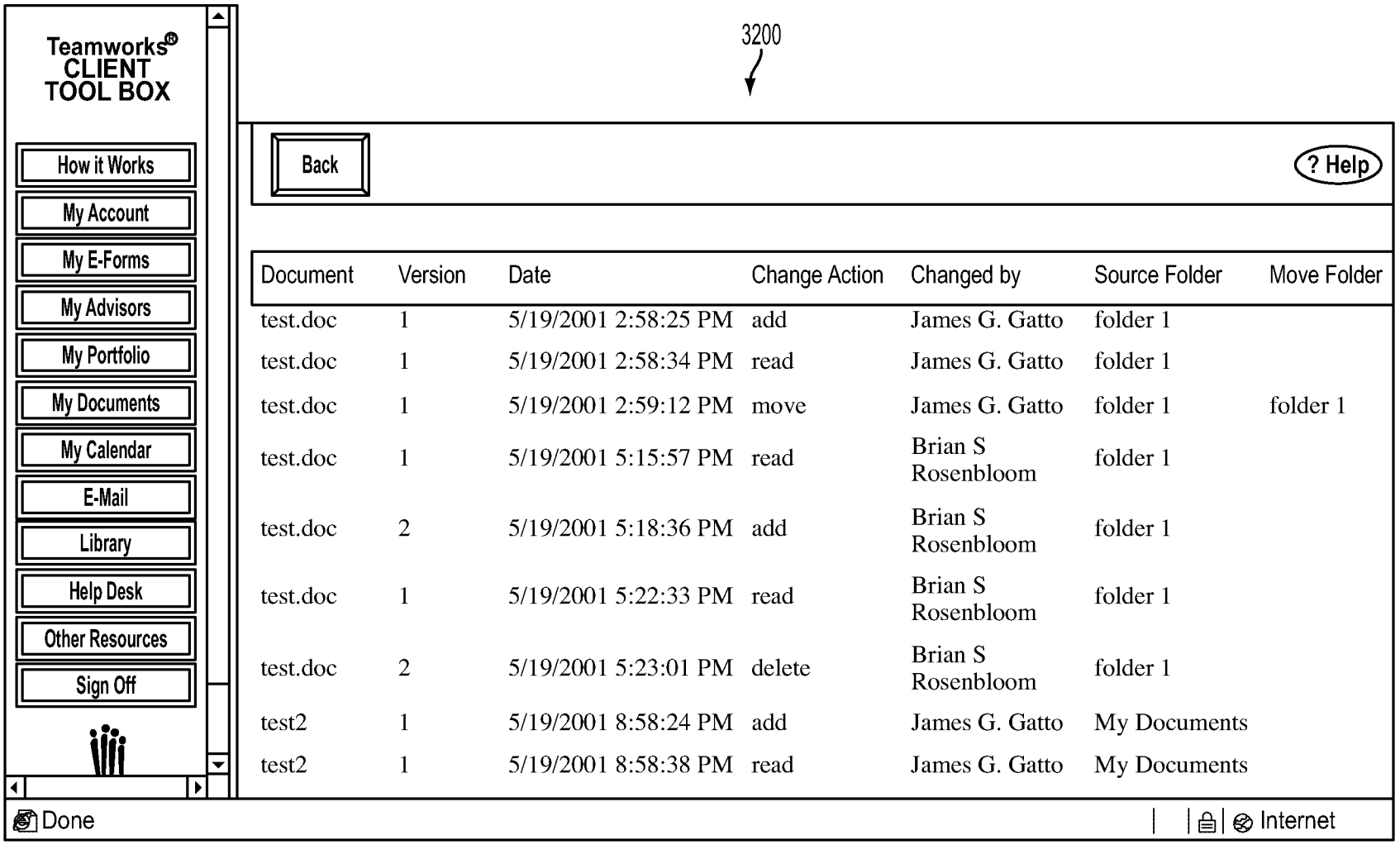


FIG. 32

REPLACEMENT SHEET

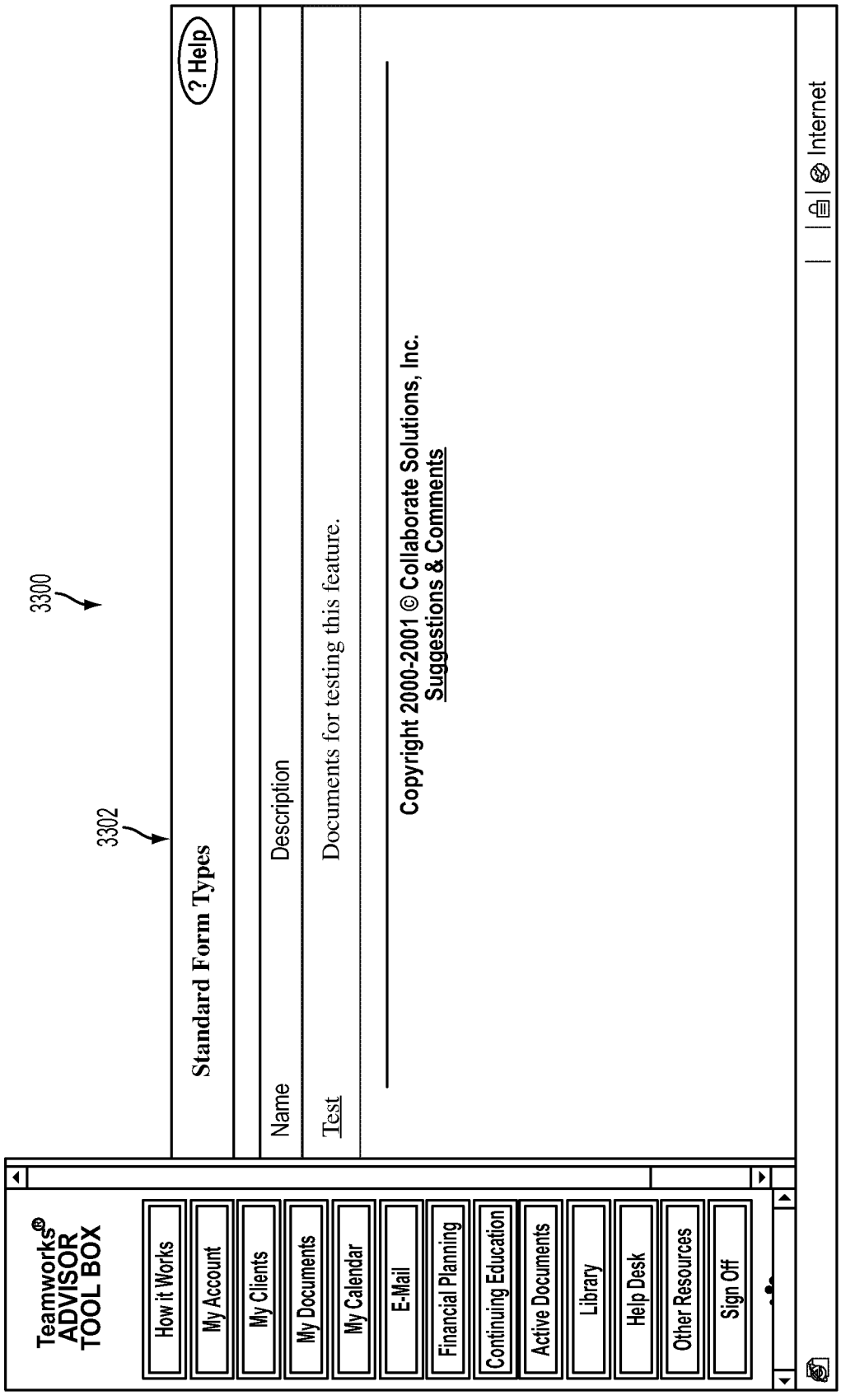
3300
3302
Teamworks®
ADVISOR
TOOL BOX
How it Works
My Account
My Clients
My Documents
My Calendar
E-Mail
Financial Planning
Continuing Education
Active Documents
Library
Help Desk
Other Resources
Sign Off
Standard Form Types
? Help
Name
Description
Test
Documents for testing this feature.
Copyright 2000-2001 © Collaborate Solutions, Inc.
Suggestions & Comments
Internet

FIG. 33

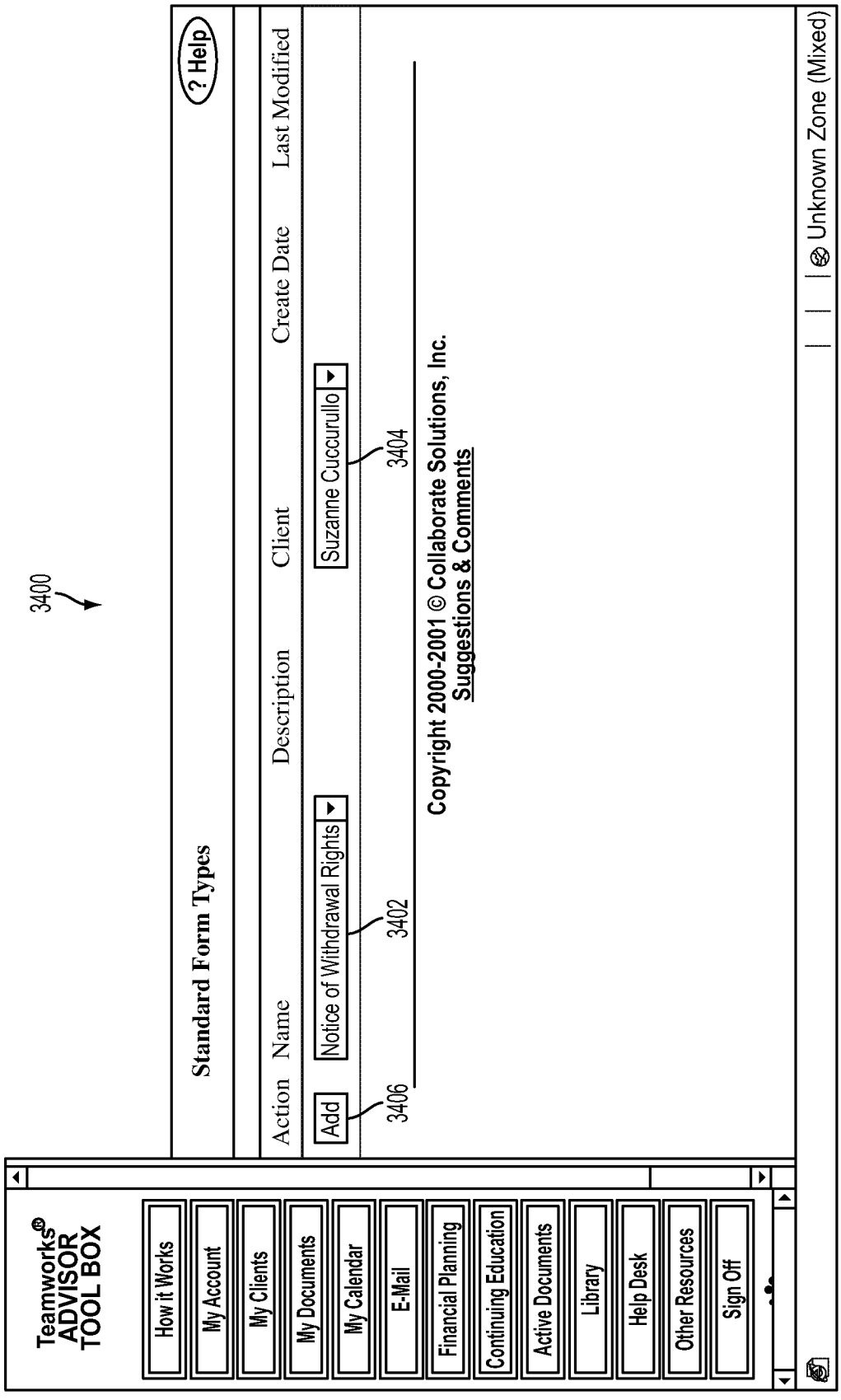
3400
Teamworks® ADVISOR TOOL BOX
How it Works
My Account
My Clients
My Documents
My Calendar
E-Mail
Financial Planning
Continuing Education
Active Documents
Library
Help Desk
Other Resources
Sign Off
? Help
Standard Form Types
Action
Name
Description
Client
Create Date
Last Modified
Add
Notice of Withdrawal Rights
Suzanne Cuccurullo
3406
3402
3404
Copyright 2000-2001 © Collaborate Solutions, Inc.
Suggestions & Comments
Unknown Zone (Mixed)

FIG. 34

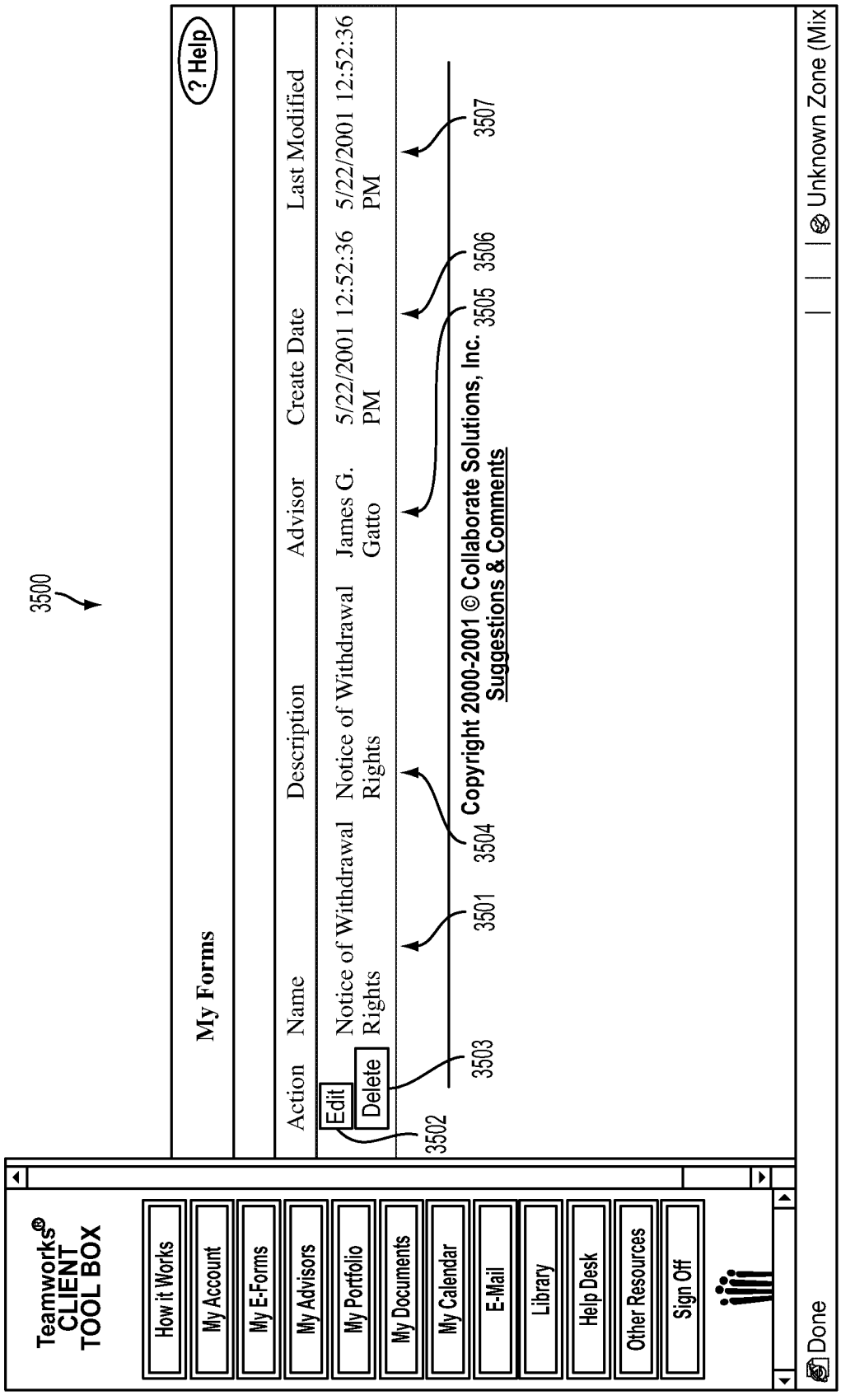
3500
Teamworks®
CLIENT
TOOL BOX
How it Works
My Account
My E-Forms
My Advisors
My Portfolio
My Documents
My Calendar
E-Mail
Library
Help Desk
Other Resources
Sign Off
My Forms
? Help
Action
Name
Description
Advisor
Create Date
Last Modified
Edit
Delete
Notice of Withdrawal Rights
Notice of Withdrawal Rights
James G. Gatto
5/22/2001 12:52:36 PM
5/22/2001 12:52:36 PM
3502
3503
3501
3504
Copyright 2000-2001 © Collaborate Solutions, Inc.
Suggestions & Comments
3505
3506
3507
Done
Unknown Zone (Mix

FIG. 35

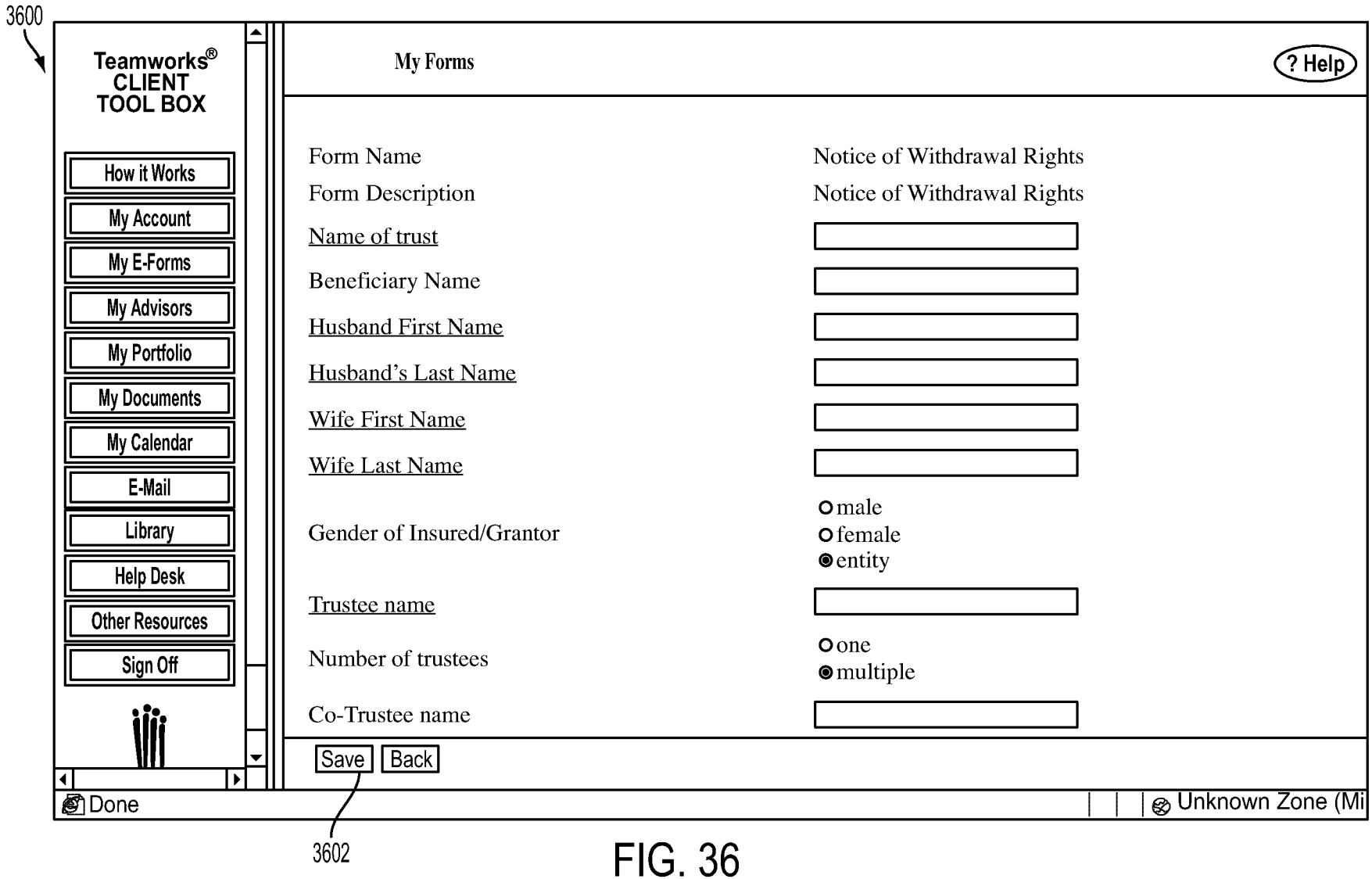


FIG. 36

REPLACEMENT SHEET

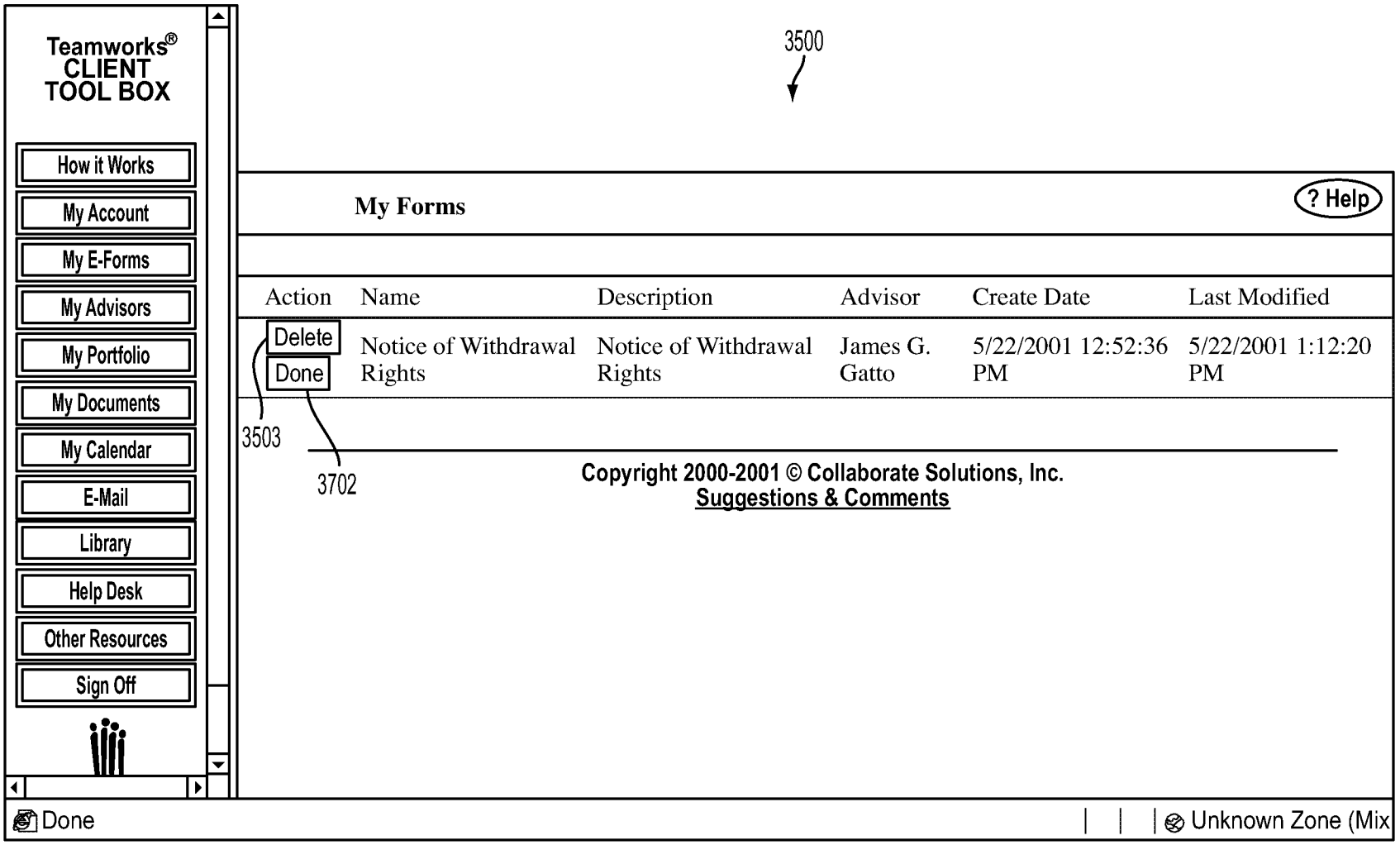


FIG. 37

REPLACEMENT SHEET

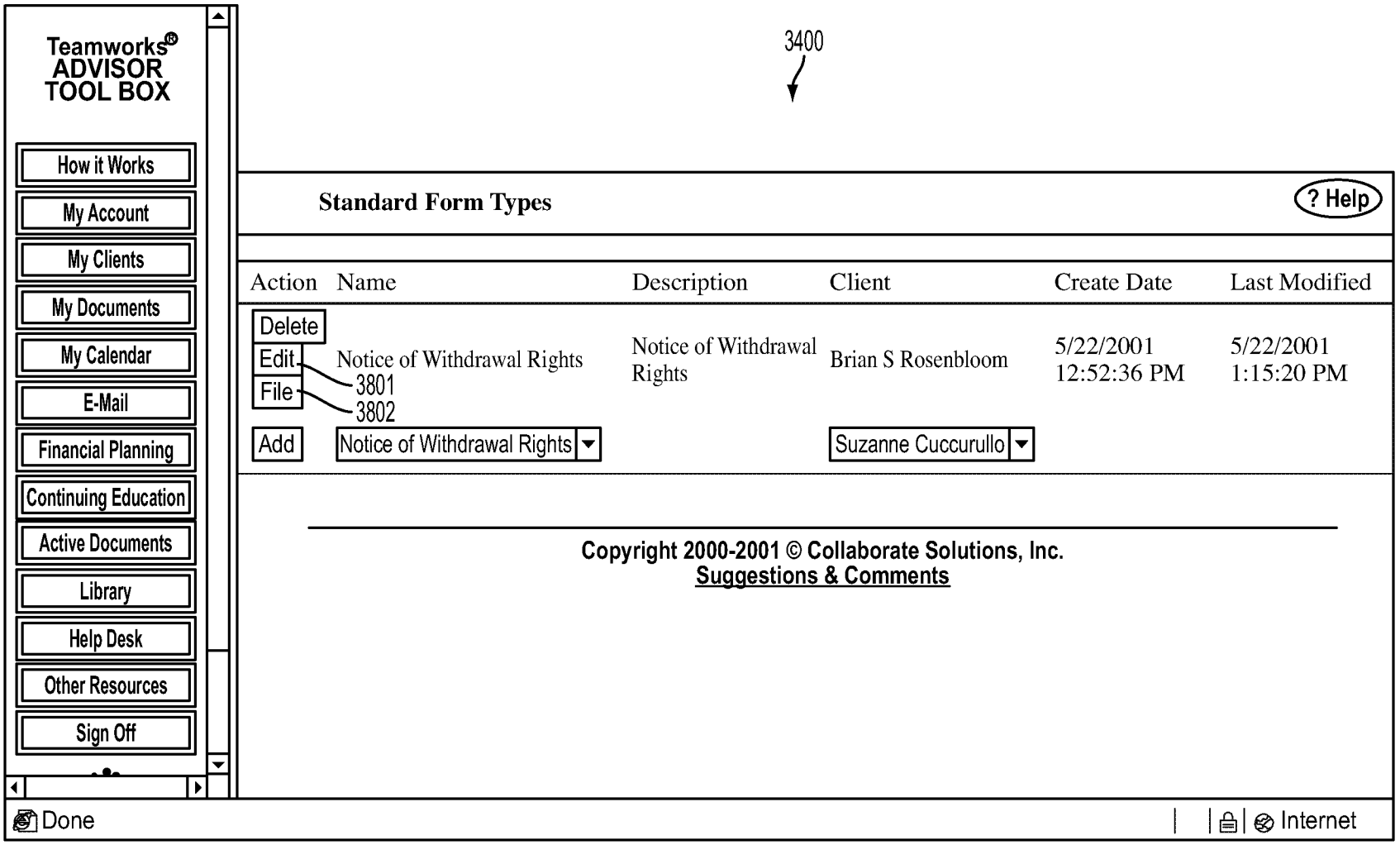


FIG. 38

REPLACEMENT SHEET

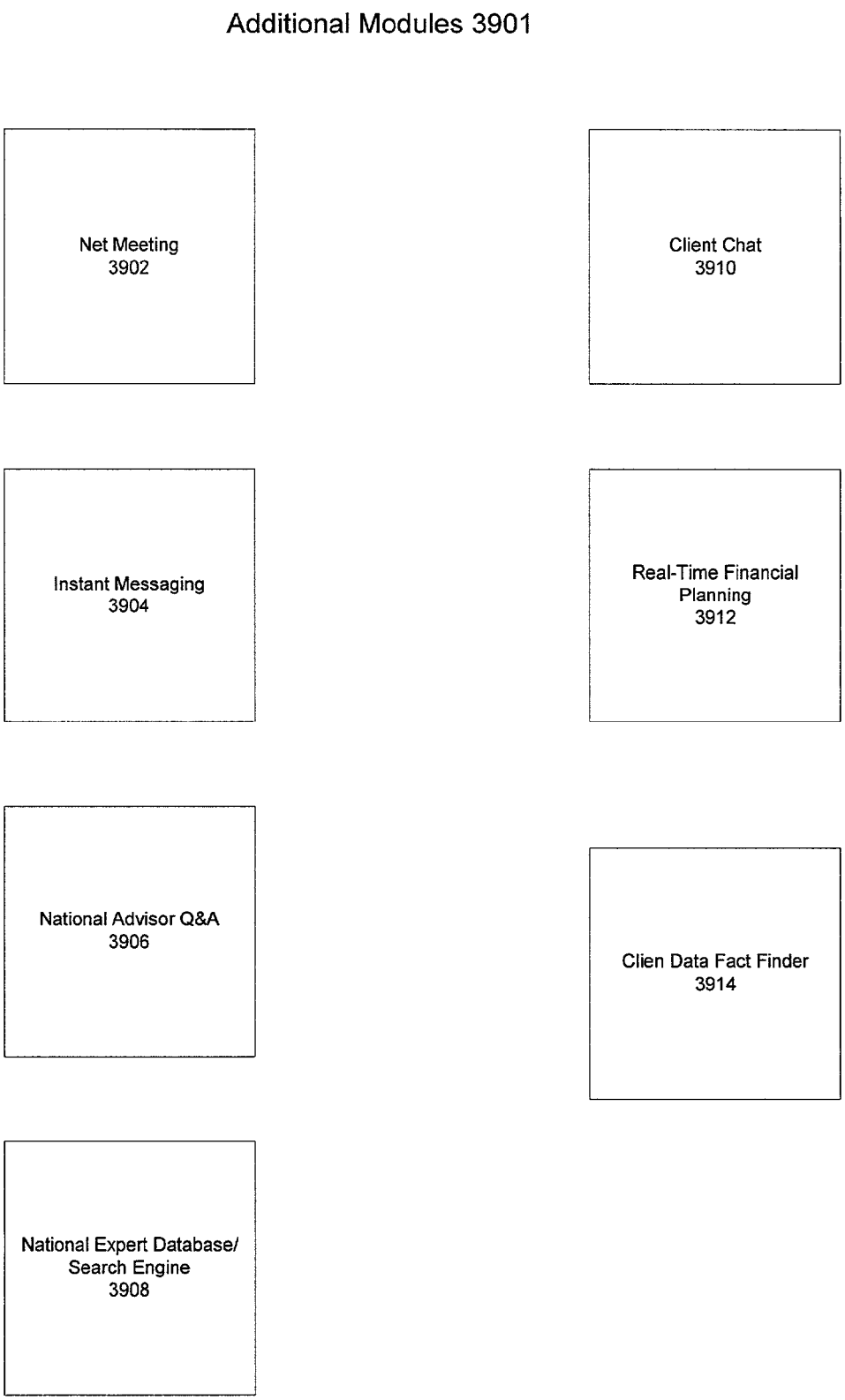
Additional Modules 3901
Net Meeting
3902
Client Chat
3910
Instant Messaging
3904
Real-Time Financial
Planning
3912
National Advisor Q&A
3906
Clien Data Fact Finder
3914
National Expert Database/
Search Engine
3908

FIG. 39

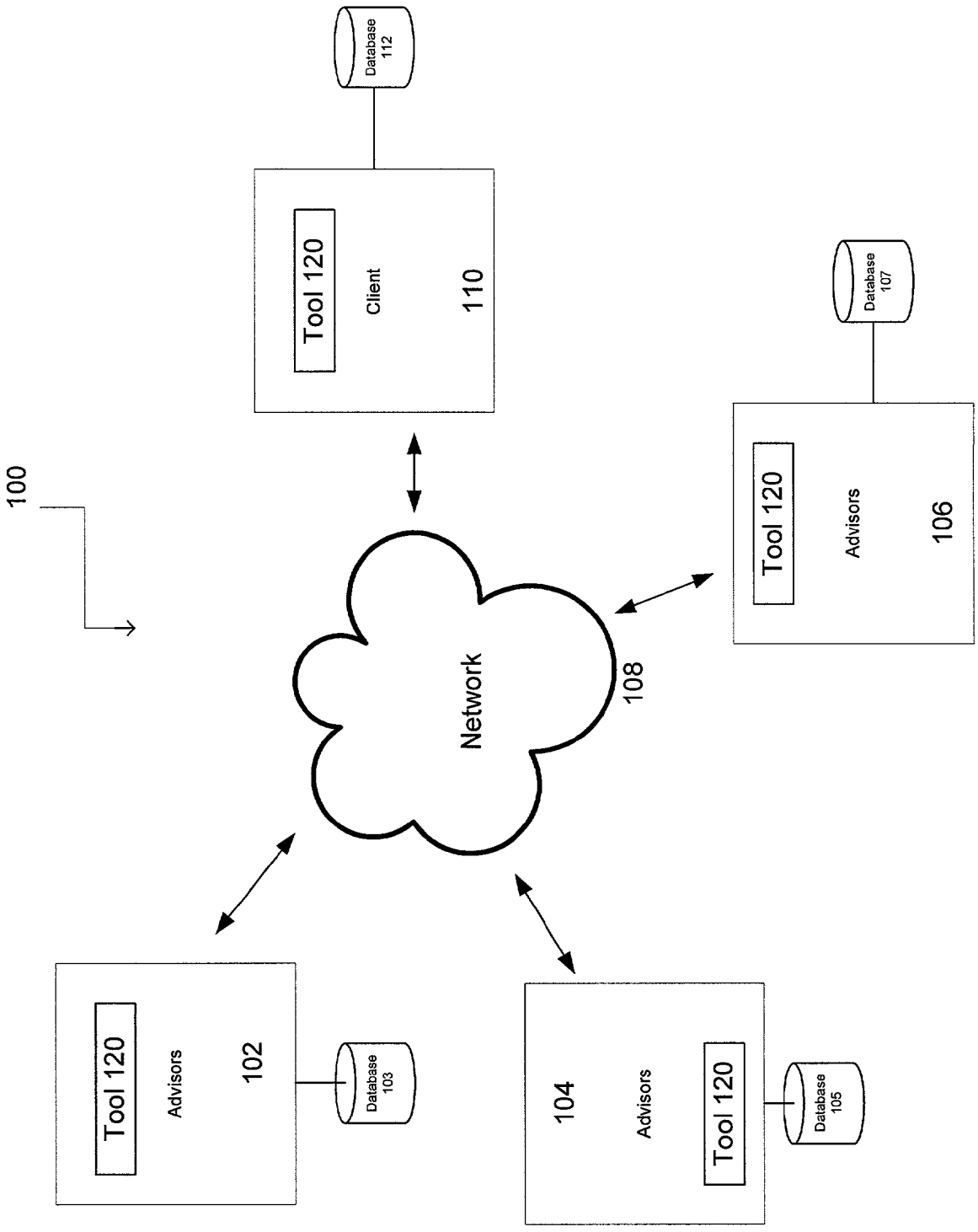
100
Database 112
Tool 120
Client
110
Database 107
Tool 120
Advisors
106
Network
108
Tool 120
Advisors
102
Database 103
104
Advisors
Tool 120
Database 105

FIG. 40

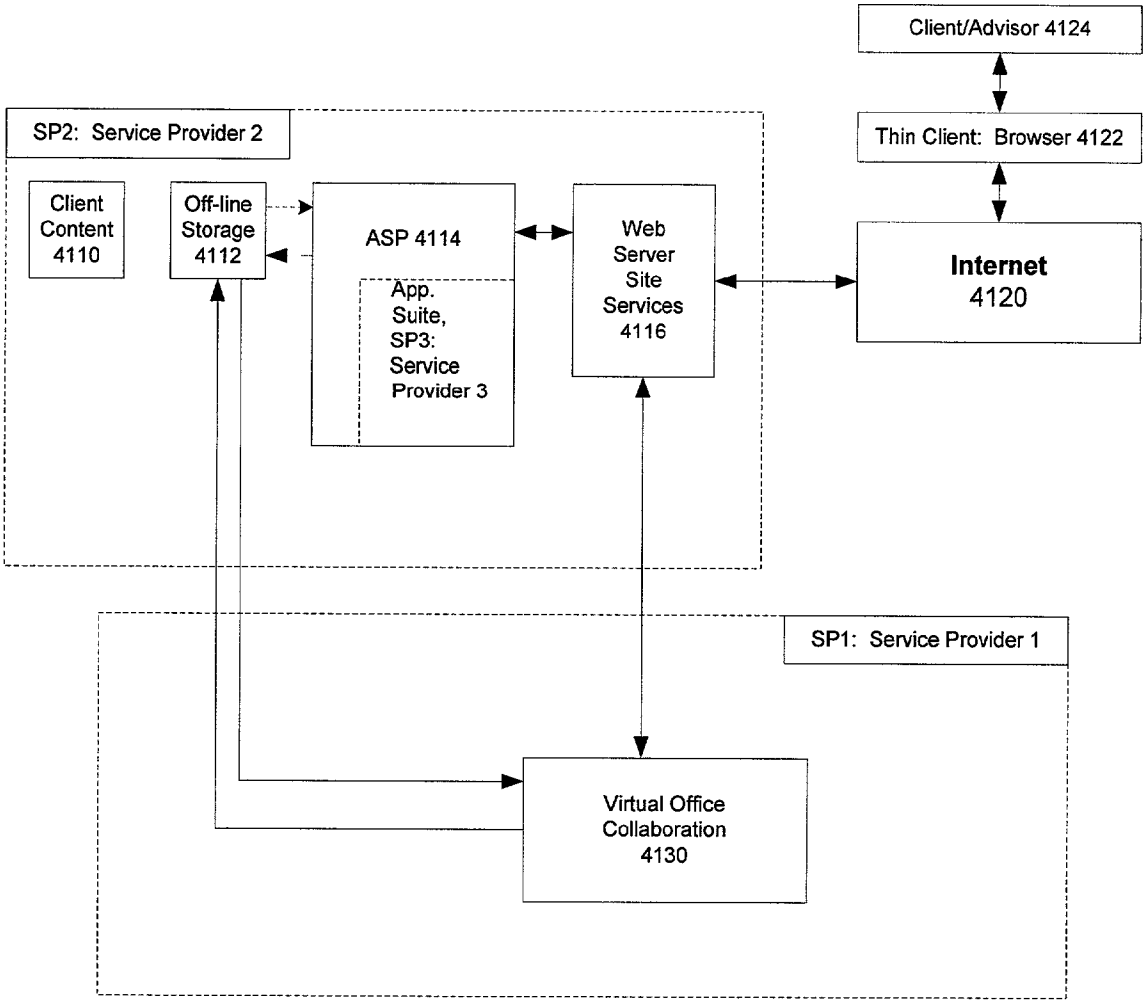
Client/Advisor 4124
Thin Client: Browser 4122
SP2: Service Provider 2
Client Content 4110
Off-line Storage 4112
ASP 4114
App. Suite, SP3: Service Provider 3
Web Server Site Services 4116
Internet 4120
SP1: Service Provider 1
Virtual Office Collaboration 4130

FIG. 41

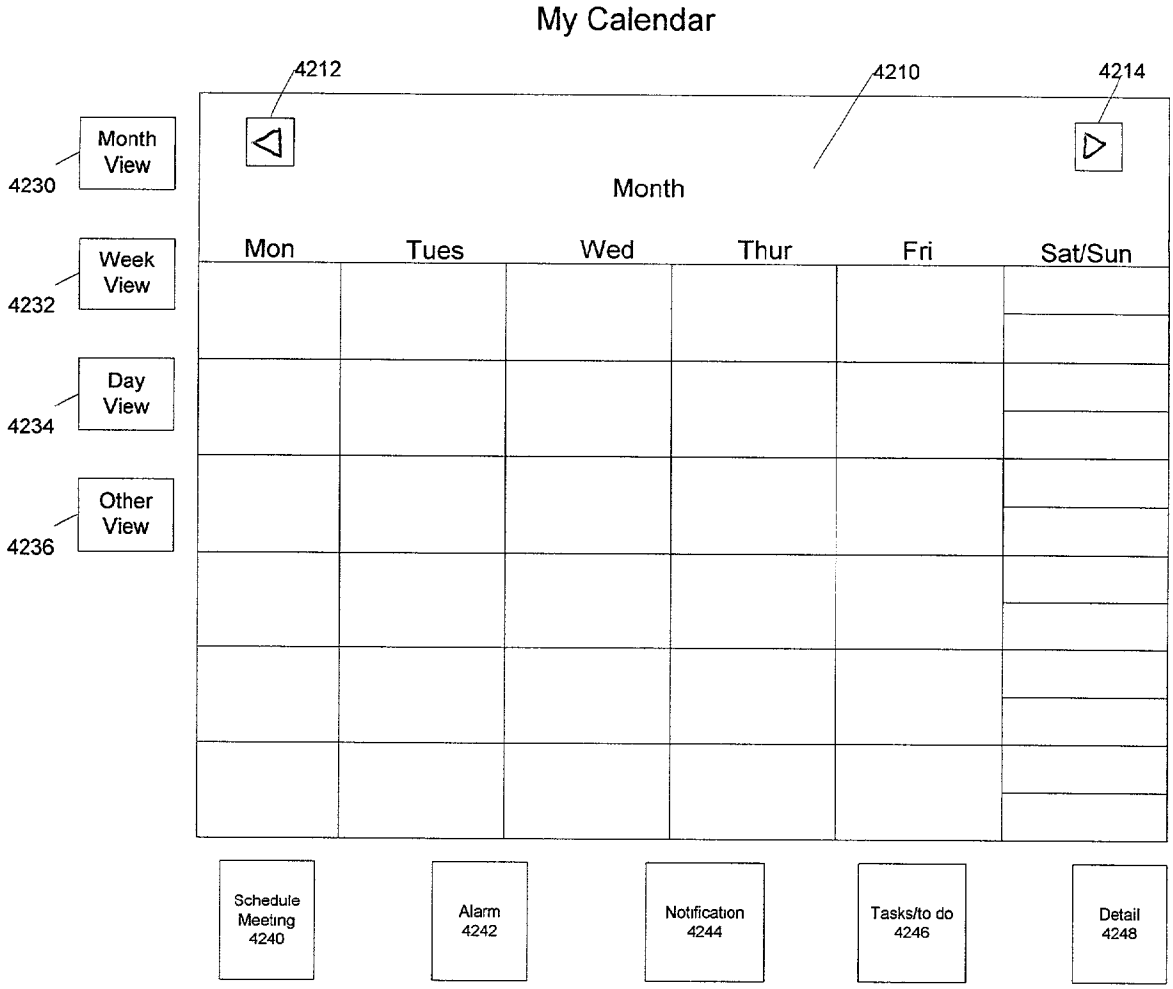
My Calendar
4212
4210
4214
Month View
4230
Week View
4232
Day View
4234
Other View
4236
Month
Mon
Tues
Wed
Thur
Fri
Sat/Sun
Schedule Meeting 4240
Alarm 4242
Notfication 4244
Tasks/to do 4246
Detail 4248

FIG. 42

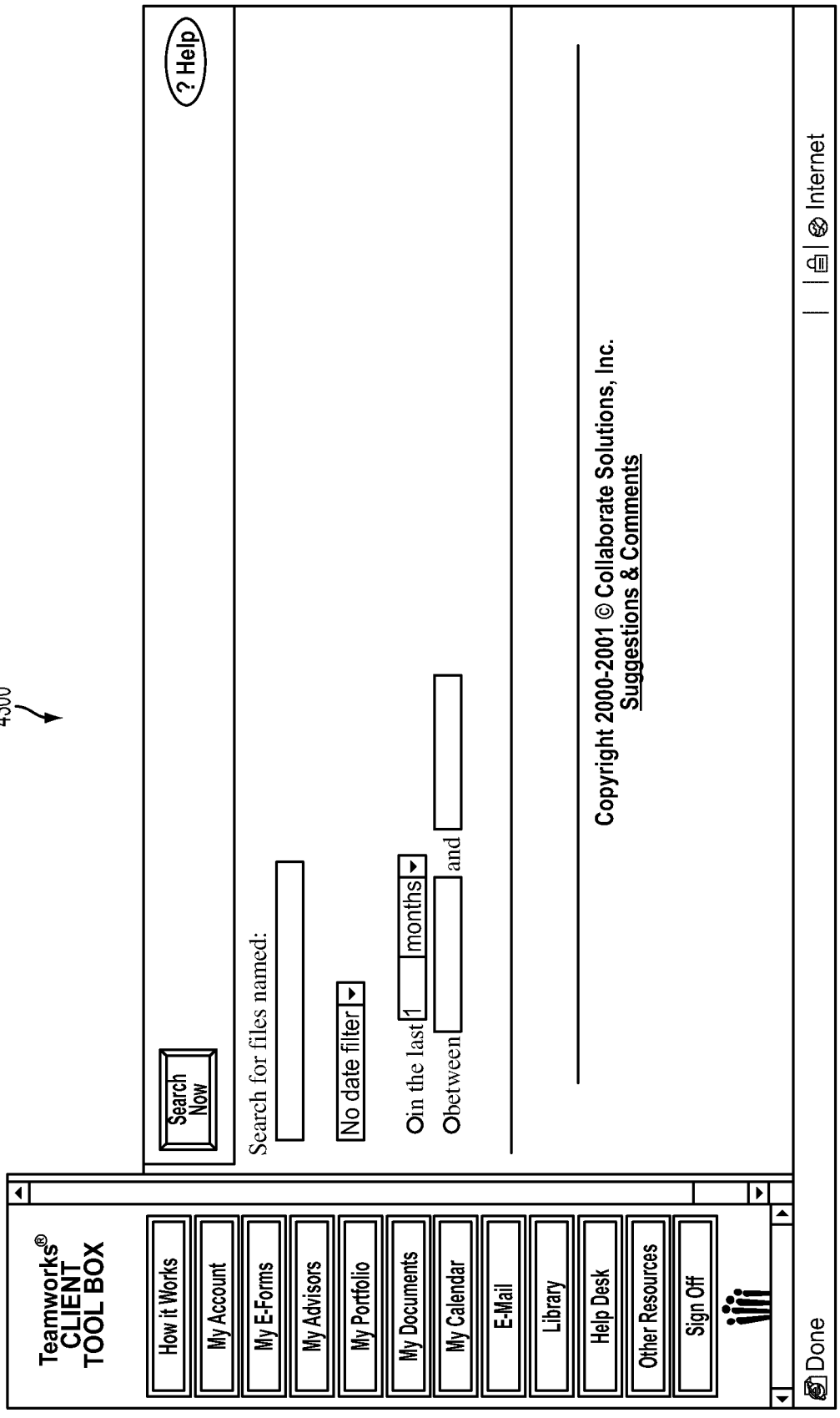
4300
Teamworks®
CLIENT
TOOL BOX
How it Works
My Account
My E-Forms
My Advisors
My Portfolio
My Documents
My Calendar
E-Mail
Library
Help Desk
Other Resources
Sign Off
Search Now
? Help
Search for files named:
No date filter
in the last 1 months
between and
Copyright 2000-2001 © Collaborate Solutions, Inc.
Suggestions & Comments
Done
Internet

FIG. 43